



Standard 14: Record Keeping and Billing

Applies to Opticianry

The College of Health and Care Professionals of BC was created on June 28, 2024 through the amalgamation of seven health regulatory colleges:

- College of Dietitians of British Columbia
- College of Occupational Therapists of British Columbia
- College of Optometrists of British Columbia
- College of Opticians of British Columbia
- College of Physical Therapists of British Columbia
- College of Psychologists of British Columbia
- College of Speech and Hearing Health Professionals of British Columbia

All current requirements for standards of clinical and ethical practice issued by the seven colleges remain in place upon amalgamation.

This document was created by the College of Opticians of British Columbia and will be updated to reflect the amalgamation.

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Related Standards of Practice

- Standard 1: Client-Centred Practice
- Standard 3: Collaborative Care
- Standard 4: Cultural Safety, Cultural Humility, and Anti-Racism
- Standard 12: Privacy and Confidentiality
- Standard 15: Communication and Marketing

Description

The optician maintains accurate, complete, and timely client and financial records in accordance with COBC's bylaws and applicable legislative and regulatory requirements.

Expected Outcome

The client can expect that the health and financial records kept by their optician are accurate, understandable, complete, and confidential, and will be provided or transferred at the client's request.

Criteria

RECORD KEEPING AND RETENTION

- 14.1 Create and maintain an accurate and truthful client record for each client, including measurements and observations based on the services provided.
- 14.2 Ensure that all records are updated to reflect new information as it becomes available.
- 14.3 Comply with all privacy [legislation](#) and [standards](#) related to the collection of, access to, and disclosure of records.
- 14.4 Ensure that records are legible and can be understood by the optician, the client, COBC, and other regulated health care professionals.
- 14.5 Maintain client records in a manner that enables timely access, as required, by the client or by an authorized COBC inspector.
- 14.6 Provide the client with reasonable access to the information maintained about them in their client record.
- 14.7 Upon client request, facilitate the timely transfer of the client record to another regulated health care professional, in accordance with relevant legislation.
- 14.8 Ensure that electronic records are kept in accordance with the Standards of Practice and the applicable privacy legislation.
- 14.9 Retain all client records for a mandatory minimum of three years and a recommended maximum of seven years from date of last entry.
- 14.10 Destroy records containing personal or health information in a secure manner.

- 14.11 Upon retirement, sale of the practice, or extended closure of the practice, notify COBC of the change, and ensure that files are not abandoned and are securely transferred in accordance with applicable privacy legislation.
- 14.12 During an extended closure, take reasonable steps to ensure that clients can access their records.
- 14.13 In the absence of a written agreement to the contrary that has been signed by both parties, note that a client record remains with the practice where the record was created.

BILLING

- 14.14 Understand professional fee structures, and review and adhere to third-party agreements.
- 14.15 Keep clear and legible financial records for all services provided and all vision appliances dispensed, including:
 - a. fees for services
 - b. product receipts
 - c. commercial laboratory work orders
 - d. invoices to clients
- 14.16 As applicable, sign an insurance form or submit an insurance claim on behalf of the client to assist them in ethically using their benefits.
- 14.17 Charge a suitable fee for conducting a pupillary distance service, as long as it is not performed as part of an independent automated refraction.
- 14.18 Do not provide an incomplete contact lens record or assessment record when a client has not paid or completed their service.
- 14.19 Charge a reasonable fee for providing a duplicate copy of the contact lens record or assessment record.