



# Practice Guidance for Occupational Therapists: Considerations for Starting or Closing a Private Practice

Updated April 2026

This practice guidance is intended to support licensees who are considering starting, leaving, or closing an occupational therapy private practice.

## Core Principles

- Public safety and acting in the patient's best interest must be the highest priorities.
- The public can expect a clear description of the scope and nature of occupational therapy services being offered (including any limitations) and is entitled to continuity of care and access to their records when an occupational therapist ceases to practise.

*Note: The information below is not exhaustive. The College strongly recommends that occupational therapists consult with professionals, such as accountants or lawyers, for assistance in determining legal requirements and best business practices.*

## Starting a Private Practice

The following are key regulatory principles and a series of reflective questions to support licensees who are considering starting an occupational therapy private practice.

### Competencies for Occupational Therapists in Canada

As regulated health professionals, occupational therapists assume professional responsibility for providing safe, ethical, and effective occupational therapy services based on [The Competencies for Occupational Therapists in Canada](#). In the interest of public protection, it is important to reflect on the application of your competencies to owning and operating a private practice.



The CHCPBC Ethics and Practice Standards require licensees to *"practise within the bounds of their scope of practice (and certification, if applicable)" (Professional Performance and Responsibility Standard, s.1)* and to *"provide only those health services they are authorized and competent to perform under the HPOA, Regulations, and CHCPBC By-laws" (s.1.1)*.

*Some questions to consider:*

- Do you have the skills, abilities, and knowledge required to own and operate a private practice?
- How will you ensure your individual competence and supports for transitions as part of your continuing professional development goals?
- How will you support the effectiveness and safety of occupational therapy services through preceptorship, supervision, mentoring, teaching, and coaching opportunities in your private practice?

## **Managing Patient Records**

Occupational therapists in private practice must maintain records in accordance with the **Records Practice Standard** in the CHCPBC Ethics and Practice Standards and B.C.'s *Personal Information Protection Act*. Occupational therapists considering starting a private practice should fully understand their responsibilities for managing records, protecting personal privacy, and ensuring proper business practices are in place to meet these standards and legal requirements.

The **Records Practice Standard** requires licensees to *"maintain a complete patient record or ensure that a system is in place to maintain a complete patient record for at least 16 years from the date of the last encounter with the patient, or 16 years from the date the patient reaches the age of majority—whichever date is later" (s.6.1)*.

Some questions to consider:

- Do you have the necessary equipment, policies, and processes in place to ensure you will be able to retain your patients' occupational therapy records for the minimum retention period required by the **Records Practice Standard (s.6.1)**?
- Do you understand your responsibilities related to financial records, including developing a schedule of fees for services rendered? (Note: the financial record is part of the clinical record and is subject to the same retention requirements.)
- What plan will you put in place to dispose of records securely, in a manner that maintains confidentiality, after the retention period expires (**Records Practice Standard, s.6.2**)?
- If using an electronic health record system, do you have a clear understanding or contract with the service provider that details how patients will be able to access their records, who maintains custody or control of the records, and how access will be granted should you change service providers in the future?



- If using a paper-based system, do you have policies and processes in place to support patients' ability to access their record, if requested?
- Do you have a privacy protection policy in place and a process for responding to access requests under the *Personal Information Protection Act*?
- If you are signing a contract to provide services with a private practice company, does it include details about how patients will be informed if or when you leave the practice and who will be responsible for retaining the patients' occupational therapy records?
- If using a third-party storage service, does it comply with all privacy, security, access, and retention requirements under privacy legislation and the Ethics and Practice Standards (**Records Practice Standard**, s.9)?

## Communicating About Your Practice

There are many factors relating to communications that must be considered in starting a private practice. As a first step, **CHCPBC Bylaw 9.14** requires licensees to give written notice to the Registrar within 14 days of any change in business contact information, personal contact information, or legal name. This is important for the public to be able to search the College Registry to verify your licensure status and place of employment, and for the College to be able to contact you.

The **Marketing, Advertising, and Promotion Practice Standard** applies to all forms of marketing, advertising, and promotion used by or on behalf of licensees. This includes business names, advertising, public statements, websites, social media, directory listings, the use of testimonials, and any other means of promoting or presenting professional services to the public.

### *Some questions to consider:*

- Are you familiar with the CHCPBC Bylaws regarding use of titles (Bylaws 9.6–9.11) and how they apply to your communications and the trust relationship with the public?
- Do you fully understand the **Consent Practice Standard** and legislation related to privacy and disclosure of information?
- What policies and procedures do you need to develop to support proactive, transparent, and standardized management of practice issues or concerns that may arise?
- Are you ensuring that all marketing, advertising, and promotional communications are accurate, honest, and consistent with the **Marketing, Advertising, and Promotion Practice Standard**?
- If considering patient testimonials or providing pro bono services, have you assessed the potential impacts and risks on the therapeutic relationship, in particular related to power imbalances (real or perceived) and professional integrity?



## Planning for the Unexpected

It is important to be prepared. Safety plans, infection prevention and control measures, and the development of policies and procedures for emergencies need to be considered.

The **Records Practice Standard** requires licensees to *"make a succession plan for record retention that will ensure ongoing compliance with the Ethics and Practice Standards and legislation in the event the licensee discontinues practice, moves to a different jurisdiction, or becomes incapable of practice"* (s.7.2).

*Some questions to consider:*

- What arrangements need to be made for patient records and personal information to be safely and securely transferred to another regulated healthcare professional in the event you are unable to work (**Records Practice Standard**, s.7.3)? Does the other professional fully understand their responsibilities for notifying patients should this happen?
- Are you familiar with the College's Practice Standards for professional boundaries, conflict of interest, and risk management and safety to be able to anticipate and mitigate risks?
- If you are a sole practitioner, how will your patients continue to receive occupational therapy services if you are suddenly unable to work?
- Do you have adequate professional liability insurance coverage for the occupational therapy services you will provide? **CHCPBC Bylaw 9.12** requires licensees to maintain professional liability protection or insurance in an amount of at least \$2,000,000.00 per claim or occurrence.
- Do you have the necessary equipment and procedures in place to effectively respond to an emergency (for example, first aid kit, fire extinguishers)?

## Incorporating Your Business

The College does not provide advice or guidance on the business models an occupational therapist may consider when starting a private practice. Occupational therapists may find it beneficial to consult with a lawyer or accountant regarding these matters.

The College occasionally receives questions about incorporation. Under the Health Professions and Occupations Act (HPOA), Health Profession Corporation (HPC) Permits are only available to licensees who practise optometry or physical therapy (HPOA, s.35(1)(a)). Occupational therapists are not eligible for HPC permits. However, an occupational therapist may incorporate a company to provide occupational therapy services, and it may be beneficial to do so for financial or business reasons.

It is important to note that a licensee who practises through a corporation has the same responsibilities to meet standards of practice and conduct and has the same liability for professional negligence as a licensee who does not practise through a company.

CHCPBC staff do not have the expertise to provide business, legal, financial, or tax advice.



## Naming Your Business

If your proposed business name includes a protected title (for example, “occupational therapist”) or names a regulated health profession (for example, “occupational therapy”), it is likely that [BC Registry Services](#) will require you to obtain consent from CHCPBC to use that term. To obtain consent, complete the application for consent and submit it to [corporations@chcpbc.org](mailto:corporations@chcpbc.org). Once approved, you will receive an approval letter from CHCPBC, which you can then provide to BC Registry Services.

It is recommended that you review the [CHCPBC Bylaws](#) and [Ethics and Practice Standards](#) to ensure you understand your responsibilities related to business naming, as well as marketing and advertising.

## Leaving or Closing a Private Practice

The following are key regulatory principles for licensees to consider when leaving or closing an occupational therapy practice. As stated above, the information is not exhaustive, and the College strongly recommends that occupational therapists consult with professionals, such as accountants or lawyers, for assistance in determining best business practices and any legal requirements.

### Notifying Patients

The CHCPBC **Code of Ethics** requires licensees to *“respect and support both the right and the ability of each patient to make informed, voluntary decisions about their healthcare while upholding the interests of the patient and ensuring safe and ethical care”* (Code of Ethics, s.7, Patient Autonomy). This includes providing complete and accurate information to enable patients to make informed decisions regarding their occupational therapy services.

The **Records Practice Standard** requires licensees to *“provide current patients with advance written notice, to the extent possible, prior to discontinuing practice or moving to a different jurisdiction, including explanation of how patients can continue to access their records”* (s.7.4).

#### *Some questions to consider:*

- How will patients be informed about anticipated changes to your practice, including information and options regarding where they can receive any ongoing occupational therapy services to ensure continuity of care (for example, the option to continue with the existing clinic or finding a new occupational therapist elsewhere)?
- If you are a contractor with a private practice business, does your contract specify how patients will be notified you are leaving and the expectations for transfer of care and who has custody and control of clinical records?



## Managing Patient Records

Patients may need to access their occupational therapy record in the future. Patients should be provided with information regarding where their records will be stored (for example, securely with the retired therapist, with a records management service, or at the existing clinic if another occupational therapist takes over the practice and agrees to store the past records). Licensees are accountable for ensuring that records are safeguarded and kept in accordance with legal obligations.

The **Records Practice Standard** requires licensees to *"make reasonable efforts to ensure information is available to all current and former patients about how they can obtain or continue to access their records"* (s.7.5).

### *Some questions to consider:*

- If applicable, does the executor of your will know what to do with your business records?
- If using a third-party storage service, does your arrangement comply with all privacy, security, access, and retention requirements under privacy legislation and the Ethics and Practice Standards (**Records Practice Standard**, s.9)?
- If using an electronic health record system, do you have a clear understanding or contract with the service provider that details how patients will be able to access their records, who maintains custody or control of the records, and how records will be disposed of after the required retention period?

## Notifying the College

The **Records Practice Standard** requires that if records are relocated, the licensee must *"notify CHCPBC of their new location within 30 business days"* (s.7.6). Licensees must also ensure that a succession plan is in place for record retention (s.7.2) and that custody and control of records is properly transferred if the licensee is no longer able to retain the records (s.7.3).

## Other Considerations

The following additional questions are offered as part of your reflective practice process to support the delivery of safe, ethical, and effective occupational therapy services.

### Logistical Considerations

- Who will you consult with as knowledgeable business experts?
- What communications systems will you need for your small business (for example, phone, email, electronic medical records)?
- How will you develop a budget and determine your rates?



- How will you accept payments and provide invoices and receipts?
- Will you be hiring staff? What does that involve?
- Have you consulted with your national or provincial professional association for any business-related resources available to members?

### **Legal and Ethical Considerations**

- Are you considering a sole proprietorship, general partnership, or corporation?
- Are you required to obtain a business licence from your local municipality?
- Do you need to register for a GST account?
- Do you require service contracts for billing third parties or funding agencies for the services you will provide?
- What business obligations or arrangements need to be met in closing your practice (for example, employee contracts, business sale, collecting fees or billing)?

The CHCPBC practice support team is available for further discussion and can be reached at [practicesupport@chcpbc.org](mailto:practicesupport@chcpbc.org) or 604-742-6715

*The College of Health and Care Professionals of BC (CHCPBC) is the regulatory body responsible for regulating the practice of occupational therapy in B.C. under the Health Professions and Occupations Act and the Health and Care Professionals Regulation. All occupational therapists who practise in B.C. must hold a licence with the College.*