RETIRED DOCUMENT

This document is retired, effective October 19, 2026. As this document is retired, it is not considered **standard** or **guidance** under the HPOA. However, licensees may find it useful as general information for their practice.

College of
HEALTH AND CARE PROFESSIONALS OF BC

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Automated Refraction: Dispensing Authority Resource

Purpose and background

The College of Health and Care Professionals of BC (CHCPBC) has developed this resource to support certified licensees who perform automated refractions and issue dispensing authorities.

The professional ***Ethics and Practice Standards*** establish strict limits and conditions regarding preparation of a dispensing authority, the types of dispensing authorities that may be used to dispense a vision appliance, the circumstances under which a dispensing authority must be released to a patient, and the information that must be included. These requirements are professional obligations—not suggestions—and they must be followed. When they are not, CHCPBC is obligated to take action to ensure compliance with the professional Ethics and Practice Standards.

This resource is designed to assist opticians who produce dispensing authorities through automated refraction by helping them determine patient eligibility, maintain appropriate records, and prepare each dispensing authority in accordance with the limits and conditions outlined in the professional Ethics and Practice Standards.

What is included?

The toolkit contains two types of resources:

- Suggested documentation (tools to assist opticians in record keeping and compliance)
- Guidance documentation (tools to guide opticians and their support staff)

Also included are information sheets that can be provided to patients to aid in their understanding of the limits of service.

Suggested documentation

Prior to conducting an automated refraction, the optician must explain—and document any related discussion regarding—the nature, purpose, intended benefits, limitations, risks, and alternatives to automated refraction. The following forms are provided to assist opticians in meeting the *Restricted Activities and Certifications Standard Appendix A*.

1. **Form 1A Sight Testing – Patient Information Sheet**
   A copy of this form may be provided to the patient, giving them the opportunity to review it. The optician is encouraged to address any questions the patient may have before performing refraction services.

2. **Form 1B Sight Testing – Patient History & Eligibility**
   The patient is to complete this form, and the optician is expected to review it to determine whether the patient is eligible for automated refraction. A copy of the completed form should be retained in the patient file as part of meeting this performance standard.

Guidance documentation

The following documents are optional resources to assist opticians and their clients:

1. **Eligibility Form Checklist**
2. **Eligibility Flow Charts**
   - For patient use, e.g., to be displayed in practice environment
3. **Dispensing Authority Template**
4. **Patient Information Sheet—Post-Assessment Information**

Form 1A : Sight Testing—Patient Information Sheet

Your optician is required to provide this information to any patient seeking an automated refraction (sight test). Before you can proceed, review this form (Form 1A) ***and*** complete Form 1B.

Purpose

Your optician has recommended an automated refraction, commonly referred to as a sight test. This information sheet will highlight what a sight test is and what it is not.

What is a sight test?

A sight test is a refraction conducted for the purpose of determining the refractive error of the eye. In other words, it tests your eyes' ability to focus. The results will help to determine what vision appliance, such as eyeglasses or contact lenses, is most appropriate to correct any deficiencies in your visual acuity—which tools will help you see better. However, a sight test does not include an eye health examination. Therefore, it is only an appropriate option if you need new eyeglasses or contact lenses but are not yet due for your next eye health examination.

What is an eye health examination?

In addition to determining refractive error, an eye health examination looks at the entire eye and visual system. It may detect eye diseases or disorders as well as other systemic health problems. An eye health examination may only be provided by a qualified practitioner (e.g., an ophthalmologist or optometrist).

What do opticians do?

Opticians are regulated health professionals who complete post-secondary education and licensing examinations to support the eye care needs of the public in BC. The primary purposes for providing health services in the practice of opticianry is to promote and maintain visual acuity. Opticianry skills may include (but are not limited to):

- Assessing refractive errors and visual acuity by conducting automated refractions.
- Performing the restricted activities of dispensing and fitting vision appliances.
- Advising on the use of vision appliances.

The opticians who conduct sight tests have received additional training for this skill and must be certified by the College of Health and Care Professionals of British Columbia to provide the service to the public.

Who can receive a sight test?

There are limits and conditions on who may receive a sight test. These limits are stated in the *CHCPBC Ethics and Practice Standards*—regulatory obligations that opticians must adhere to. Healthy adults aged 19 to 64 can receive a sight test. If you are under 19 or 65 or older, or have a history of the eye conditions or diseases listed below, you cannot receive a sight test unless a qualified practitioner has already performed an eye health examination on you and has subsequently requested that a sight test be provided.

If you are 19 or older, you may only receive a sight test if you have had at least one eye health examination since turning 19. If you are aged 40 to 64, you may only receive a sight test if you have had at least one eye health examination since turning 40.

You cannot receive a sight test if you are currently experiencing or have a history of any of the following:

1. Glaucoma
2. Retinal detachment
3. Macular degeneration
4. Diplopia (double vision)
5. Ocular motility disorder
6. Binocular vision dysfunction
7. Refractive error exceeding plus or minus 6.00 dioptres in either eye
8. Diabetes
9. Hypertension
10. Head or brain injury within the past 12 months, or ongoing symptoms such as headache, dizziness, blurred vision, loss of consciousness, or cognitive impairment
11. Injury or pain occurring to or in either eye within the previous 3 months

For more information on sight testing eligibility, ask your optician.

What can I expect after a sight test?

After the service is complete, your optician will prepare a dispensing authority that details your sight-test results at the time of the refraction. This dispensing authority can be used by any optician to make eyeglasses or to dispense contact lenses after a contact lens fitting. An optician may use their discretion or follow their business's policies when determining whether they can use another optician's dispensing authority to make your eyewear. Some optical locations may require you to have had an eye examination.

A dispensing authority is not the same as a prescription. A prescription for eyewear is a record created by a qualified practitioner after completion of an eye health examination.

There are some exceptions. Depending on the results of your refraction, you may not be eligible to have a dispensing authority generated, and you may need to see an optometrist for an eye health examination before new eyeglasses can be dispensed to you. These exceptions are outlined in the professional *Ethics and Practice Standards*—regulatory requirements that opticians must adhere to. Ask your optician for more information.

The fee for sight-testing varies by business, but the dispensing authority that your optician produces is free (for the first copy).

If you are not eligible to receive your dispensing authority, the optician cannot charge you for the sight testing service.

How often should I get an eye health examination?

The ideal frequency of eye health examinations varies from person to person; your family doctor, optometrist, or ophthalmologist can advise you on how often is right for you. Your optician can arrange for you to have an eye health examination with an optometrist, or, if you require specialist care, your family doctor can refer you to a medical doctor specializing in eye health (an ophthalmologist).

Looking out for you

The College of Health and Care Professionals of British Columbia (CHCPBC) is the regulatory college for all opticians in BC. CHCPBC establishes qualifications for opticians and works to ensure that opticians are providing competent and safe care. If you have questions or comments about the sight testing procedure, please contact us at 604-742-6715 or practicesupport@chcpbc.org.

Form 1B : Sight Testing—Patient History & Eligibility

DATE: M M D D Y Y Y Y

PATIENT NAME: Last name First name

ADDRESS: Unit, number, and street name

City Province Postal code

PHONE:

DATE OF BIRTH: M M D D Y Y Y Y **CURRENT AGE:**

By completing this form, you affirm that you have received, read, and understood **Form 1A: Sight Testing —Patient Information Sheet**. If you do not know the difference between an eye health examination and a sight test, please ask your optician for clarification before proceeding.

Health information

1. Date of last eye health examination (by an optometrist, ophthalmologist, or qualified practitioner):

2. Did an optometrist, ophthalmologist, or qualified practitioner advise you to visit an optician for a sight test? Yes No

   If Yes, provide name of the optometrist, ophthalmologist, or qualified practitioner:

(continued on next page)

3. To the best of your knowledge, are you currently experiencing and/or do you have a history of any of the following conditions?

a) glaucoma	Yes ☐	No ☐
b) retinal detachment	Yes ☐	No ☐
c) macular degeneration	Yes ☐	No ☐
d) diplopia (double vision)	Yes ☐	No ☐
e) ocular motility disorder	Yes ☐	No ☐
f) binocular vision dysfunction	Yes ☐	No ☐
g) refractive error exceeding plus or minus 6.00 dioptres in either eye	Yes ☐	No ☐
h) diabetes	Yes ☐	No ☐
i) hypertension	Yes ☐	No ☐
j) head or brain injury within the past 12 months, or ongoing symptoms such as headache, dizziness, blurred vision, loss of consciousness, or cognitive impairment	Yes ☐	No ☐
k) injury or pain occurring to or in either eye within the previous 3 months	Yes ☐	No ☐

4. Why have you come to have a sight test?

5. Is there any other health condition or information that you would like the optician to be aware of? Please specify.

PATIENT SIGNATURE:

OPTICIAN SIGNATURE:

OPTICIAN NAME:

OPTICIAN LICENCE #:

DATE: M M D D Y Y Y Y

For optician's use only:

☐ **(Initial)**

If the patient was ineligible for a refraction, the optician must recommend an eye health examination. Initial to confirm that an eye health examination was recommended.

Note: This Patient History & Eligibility form must be retained with the patient file.

Optician Review of Patient Information—Eligibility Checklist

CHCPBC has developed this optional form to assist an optician in determining whether their patient is eligible to receive an automated refraction, whether a dispensing authority can be provided based on such a refraction, and—where a dispensing authority has been produced—whether a vision appliance can be dispensed.

1. Has the patient signed **Form 1B: Sight Testing – Patient History & Eligibility**?

   Yes ☐ No ☐

2. Have you answered all of the patient's questions about the difference between an eye health examination and a sight test or confirmed that they have no questions?

   Yes ☐ No ☐

3. Have you informed the patient that you are performing a sight test, not an eye health examination?

   Yes ☐ No ☐

4. Have you reviewed the Patient's health information with the patient?

   Yes ☐ No ☐

If you answered *No* to any of the above questions, please go back and complete the necessary steps before determining the patient's eligibility. If the steps cannot be completed, you must recommend an eye health examination instead of a sight test.

A

If you answered *Yes* to all of the above questions, check Box A and proceed to Question 5.

5. Is the patient 65 or older?

   Yes ☐ No ☐

6. Is the patient 18 or younger?

   Yes ☐ No ☐

If you answered *Yes* to Question 5 or 6, proceed directly to Question 10.

B

If you answered *No* to both questions, check Box B and proceed to Question 7.

7. Has the patient had an eye health examination since turning 19?

Yes ☐ No ☐

8. If the patient is 40 or older, have they had an eye health examination since turning 40?

Yes ☐ No ☐ Not applicable ☐

If you answered *No* to Question(s) 7 AND/OR 8, proceed directly to Question 10.

C

If you answered *Yes* OR Not applicable to both questions, check Box C and proceed to Question 9.

9. Did the patient answer *Yes* to any of the conditions listed in Item 3 on **Form 1B: Sight Testing – Patient History & Eligibility**?

Yes ☐ No ☐

If you answered *Yes* to Question 9, proceed directly to Question 10.

If you answered *No* to Question 9, AND have checked Boxes A, B, AND C, the patient is eligible for a sight test. (You do NOT need to answer the remaining questions.)

10. Has the patient been referred to you by a appropriately qualified healthcare professional (who has performed an eye health examination)?

Yes ☐ No ☐

11. Does the name of the prescriber AND the date of the patient's most recent eye health exam appear on **Form 1B: Sight Testing – Patient History & Eligibility**?

Yes ☐ No ☐

If you answered *Yes* to Questions 10 AND 11, AND have checked Box A, the patient is eligible for a sight test.

If you answered *No* to Question(s) 10 AND/OR 11, you must recommend an eye health examination instead of a sight test.

Use the following upon completion of a sight test to determine if a dispensing authority can be produced and a vision appliance dispensed as per the limits and conditions for preparation of a dispensing authority.

Post-refraction information

1. You **cannot** dispense corrective eyeglass lenses or contact lenses if any of the following is observed during the refraction:

    A. A total change in refractive error exceeding plus or minus 1.00 dioptres in either eye within the previous six months.
    B. A change in refractive error exceeding plus or minus 2.00 dioptres in either eye since the date of the most recent prescription or dispensing authority provided to you by the patient.
    C. Total refractive error exceeding plus or minus 6.00 dioptres in either eye.
    D. A potential ocular motility disorder or binocular vision dysfunction.
    E. The patient is dissatisfied with best corrected vision after two automated refractions performed within the same session.

2. You **may** dispense corrective lenses where the dispensing authority indicates A–D above if the patient has been referred to you by a appropriately qualified healthcare professional.

Charging the patient for the sight test

You **cannot** charge the patient for a sight test if:

A. The automated refraction fails to produce usable information or cannot be performed.
B. Any of the limits or conditions identified in A–E of the “Post-assessment information” above applies.

Providing the dispensing authority to the patient

Regulatory obligations require that you provide the patient with a legible copy of the dispensing authority, which must include the patient’s full name, the date of the automated refraction, and the optician’s name, address, license number, and signature.

Need new eyeglasses or contact lenses?

You may require a

Sight Test or Eye Health Exam

What is the difference between a Sight Test and an Eye Health Exam?

Sight Tests and Eye Health Examinations are different services performed by different eye health professionals:

Sight Tests

ASSESS VISUAL POWER

Performed by an optician to determine the lens power required to correct vision.

There are limits and conditions on who may receive a Sight Test.

OR

Eye Health Examinations

ASSESS VISUAL POWER & HEALTH OF EYE

Performed by an optometrist or ophthalmologist to determine the lens power required to correct vision and the overall health of the eye.

There are no limits or conditions on who may receive an Eye Health Exam.

Who is eligible for a Sight Test?

You can have a Sight Test if:

- You are aged 19–39 and have had an Eye Health Exam since turning 19
- You are aged 40–64 and have had an Eye Health Exam since turning 40

AND you have no history of eye conditions or disease, **OR**

- You have been referred by an optometrist or ophthalmologist

The optician can order your eyeglasses or contact lenses based on the Sight Test dispensing authority.

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LicensedOptician™

Dispensing Authority

PATIENT NAME:

ADDRESS:

Unit, number, and street name

City | Province | Postal code

DATE OF REFRACTION:

M M D D Y Y Y Y

	Sphere	Cylinder	Axis
O.D.			
O.S.			
ADD POWER			

OTHER INFORMATION:

I have conducted an automated refraction on the above-named patient, in accordance with the *Ethics and Practice Standards*, with the following result:

- ☐ Dispensing Authority as recorded above
- ☐ No Dispensing Authority was produced
- ☐ Referred to a prescriber

Name and address of Licensed Optician's practice:

OPTICIAN NAME:

OPTICIAN SIGNATURE:

OPTICIAN LICENCE #:

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Patient information sheet

Your optician has advised you that you are not eligible to receive a dispensing authority and that you must instead go for an eye health examination. This information sheet was created by the College of Health and Care Professionals of British Columbia to help you understand why this has occurred and to address any questions you may have.

Why you are not eligible to receive a dispensing authority

Opticians are required to follow regulatory standards related to sight testing. These standards define certain circumstances in which you may not be eligible to receive your dispensing authority or to have eyeglasses or contact lenses made based on the results of a sight test. This can happen if your optician notices something during the sight test that they did not know about before the service began.

Specifically, your optician **must not** provide a dispensing authority or dispense eyeglasses or contact lenses based on an automated refraction in which they observed any of the following:

1. The refractive error of either of your eyes has changed by more than 1.00 dioptre (plus or minus) within the last six months.
2. The refractive error of either of your eyes has changed by more than 2.00 dioptres (plus or minus) since the date of your most recent prescription or dispensing authority.
3. Your refractive error is more than 6.0 dioptres (plus or minus) in either eye.
4. There is a possibility that you may have a ocular motility disorder or binocular vision dysfunction.
5. You are not satisfied with your best-corrected vision, even after your optician has performed two sight tests in one sitting.

If your optician makes any of these observations, they **must recommend an eye health examination—a service that opticians do not offer.** Although your optician cannot provide you with a dispensing authority or produce eyewear for you at this time, they also cannot charge you for the sight test.

If you have any questions about the terminology used above, or other questions about sight testing, please ask your optician.

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