



**College of  
Occupational Therapists  
of British Columbia**

**COTBC Practice Standards for  
Managing Client Information, 2014**

# **Practice Standard #3: Client Access to the Occupational Therapy Record**

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## Practice Standards for Managing Client Information

# Practice Standard #3: Client Access to the Occupational Therapy Record



The occupational therapist will know and understand legislative obligations and organizational policies and procedures respecting client records so as to be able to help the client access his or her occupational therapy information.

### Practice Expectations

The occupational therapist will do the following:

1. Respond within 30 days to requests by the client or a legally authorized representative for access to the client's occupational therapy record.

2. If organizational policies do not exist or are insufficient, develop policies or protocols for client access to occupational therapy records in accordance with legislation, COTBC Bylaws, and other published COTBC documents.
3. Not agree to contractual provisions which are inconsistent with his or her statutory obligations (e.g., requests by organizations to restrict client access to information).
4. Provide an opportunity for the client to review and correct personal information in response to any concerns that it is not complete or accurate.

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## Practice Standards for Managing Client Information



### Practice Standard #3: Client Access to the Occupational Therapy Record, continued

#### Practice Expectations continued...

5. The client may request corrections to his or her occupational therapy records, but does not have the right to demand that the correction be made. If the occupational therapist does not agree that there is an error or omission, he or she must record the client's request for the correction in the record.
6. Charge only a reasonable fee to cover the costs of copying and, where appropriate, staff time in retrieving and reproducing the requested record.
7. Take reasonable measures to ensure the preservation, security, and ongoing access to client occupational therapy records in the event that the agency or organization in which the occupational therapist is employed ceases to operate.

## Practice Standards for Managing Client Information

# Additional Resources



### College Resources

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#### [COTBC Bylaws](#) 75, and 78–88

- The client may request that a record be corrected if he or she believes that the record has an error or omission. Bylaw 77(1),(2)
  - Client information may be disclosed or shared under only certain conditions. Bylaw 79(1)(a–m).
  - The client has the right to access personal information. Bylaw 88
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#### [Advisory Statements](#)

Providing Client Access to and Releasing Occupational Therapy Information (2009)

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COTBC thanks the College of Occupational Therapists of Ontario for permission to adapt content from their *Standards for Record Keeping* (2008).



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**Practice Standards in this series: *Managing Client Information* (2014)**

- 1. Collecting and Recording Client Information**
- 2. Protecting Client Information (Privacy and Security)**
- 3. Client Access to the Occupational Therapy Record**
- 4. Disclosing the Occupational Therapy Record**
- 5. Records Respecting Financial Matters**
- 6. Retention and Destruction of the Occupational Therapy Record**

For more information regarding this series of practice standards, or other practice supports, please contact the College at:

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