COTBC Webinars

Today's session will start shortly

QUALITY PRACTICE WEBINARS

Managing Client Information

Welcome!

- Participants are placed on mute.
- Please type your questions in the chat box.
- Sessions are recorded and posted within 24 hours.
- Thank you for attending – please complete our evaluation.

QUALITY PRACTICE WEBINARS

Managing Client Information

Today's speaker….

Andrea Bowden

Practice and Policy Consultant

QUALITY PRACTICE WEBINARS

MANAGING CLIENT INFORMATION

Today's Session

	Timing
Introductions	12:00 -12:05
Standards and Guidelines	12:05 - 12:30
Exploring the Standards	
Hot Topics	
Questions and Answers	12:30 - 12:40
Wrap-up	12:40 -12:45

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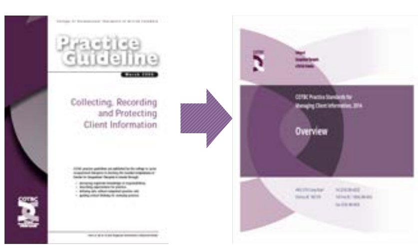
Guidelines vs. Standards…. What's the difference?



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Guideline	Standard
Suggestions for enhanced or best practices	*Minimum* that must be met by the profession
Not intended to be mandatory	Practice expectations
"may", "suggest", "recommend"	"expect", "must", "shall", require"

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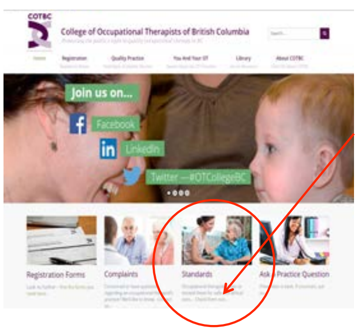

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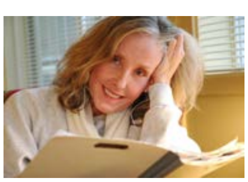

Six Practice Standards:

1. Collecting and Recording Client Information
2. Protecting Client Information
3. Client Access to the OT Record
4. Disclosing the OT Record
5. Records Respecting Financial Matters
6. Retention and Destruction of the OT Record

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MANAGING CLIENT INFORMATION

1. Collecting and Recording Client Information

- What information must be **collected**
- What information must be **recorded/included**
- The **'how'** in general terms.

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2. Protecting Client Information

- Develop protocols
- Locked/password protected
- Limit transporting information
- Notice on emails
- Consent to email
- Mail marked 'confidential'
- Notification if stolen, lost, accessed

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3. Client Access to the OT Record

- Respond to client requests in 30 days
- Develop policies/protocols
- Do not agree to contracts inconsistent with obligations.

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3. Client Access to the OT Record

- Provide an opportunity to review personal info
- Follow process when client requests change to record.
- Fees for copying/staff time
- Ensure preservation, security and ongoing access

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4. Disclosing the OT Record

"The occupational therapist will transfer, share, or disclose personal information only with the express consent of the client unless otherwise permitted to do so by law" (p. 2)

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5. Records Respecting Financial Matters

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6. Retention and Destruction of the OT Record

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Risk Assessment and Management Tool

Risk management is "nothing more than a careful examination of what, in your work, could cause harm to people, so that you can weigh up whether you have taken enough precautions or should do more to prevent harm".

Health and Safety Executive, 1999

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Emailing Client Information

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Starting/Retiring from Private Practice…

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THANK YOU FOR LISTENING… Questions?

- Please fill out the evaluation.
- Recording will be available in 24 hours
- Additional questions? Email practice@cotbc.org
- Join us on
  @OTCollegeBC

UPCOMING WEBINARS

Coming up!

Quality Practice Series	Date/Time
Duty to Report/ Professional Accountability	July 23, 2014
Supervising Support Personnel	Aug 20, 2015
Duty of Care/ Working Safely	Sept 24, 2015

Exam Prep Series	Date
Deferrals and Accommodations	July 9, 2015
Finding a Proctor	Aug 13, 2015
How to Study for the CCE	Sept 10, 2015