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.

Today’s speaker:

Andrea Bowden
Practice and Policy Consultant
MANAGING CLIENT INFORMATION

Today’s Session

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QUALITY PRACTICE WEBINARS

Guidelines vs. Standards... What’s the difference?
### 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
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.

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

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.
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

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)

5. Records Respecting Financial Matters
6. Retention and Destruction of the OT Record

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
Emailing Client Information

QUALITY PRACTICE WEBINARS
MANAGING CLIENT INFORMATION

Starting/Retiring from Private Practice...

QUALITY PRACTICE WEBINARS
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MANAGING CLIENT INFORMATION

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 Facebook, Twitter, LinkedIn @OTCollegeBC

UPCOMING WEBINARS

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