



**College of  
Occupational Therapists  
of British Columbia**

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

**Practice Standard #2:  
Protecting Client Information  
(Privacy and Security)**

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## Practice Standards for Managing Client Information

# Practice Standard #2: Protecting Client Information (Privacy and Security)



The occupational therapist will take measures to ensure client confidentiality and the security of client information in order to prevent unauthorized access.

The occupational therapist has a responsibility to understand and apply the legislation that applies to his or her practice and determine personal roles and responsibilities within the context of the practice.

The occupational therapist is expected to consult the relevant legislation, provincial and federal, to determine his or her role in this context (FOIPPA, PIPA, *E-Health Act*, *Privacy Act*, PIPEDA).

Privacy relates to the right of individuals to determine when, how, and to what extent they share their personal information.

Security refers to those mechanisms that restrict unauthorized access and preserve the integrity of information.

## Practice Standards for Managing Client Information

### Practice Standard #2: Protecting Client Information (Privacy and Security), continued



#### Practice Expectations

The occupational therapist will do the following:

1. Develop protocols for storage, access, retention, and destruction of client records in keeping with all applicable legislation and COTBC Bylaws.
2. Store all occupational therapy records in locked filing cabinets and ensure password-protected computer access.
3. When travelling, limit the amount and visibility of client information being transported (on paper or portable electronic devices).
4. Place a notice at the bottom of all emails and fax transmissions regarding confidentiality and procedures if the information is sent to the wrong address or phone line inadvertently.
5. Obtain client consent regarding what information can be communicated by email.
6. Ensure that client information to be delivered by mail is sealed, addressed accurately, and marked “confidential.”
7. Make reasonable efforts to notify the individual involved if his or her information has been lost or stolen, or accessed without his or her authorization.

## Practice Standards for Managing Client Information

# Additional Resources



College Resources	Links
<p data-bbox="302 651 655 683"><a href="#">Essential Competencies</a></p> <p data-bbox="396 704 989 776">Unit 5: Communicates and Collaborates Effectively</p>	<p data-bbox="1157 651 1533 760">Freedom of Information and Protection of Privacy Act (<a href="#">FOIPPA</a>) 1996</p> <p data-bbox="1157 781 1543 852">Personal Information Protection Act (<a href="#">PIPA</a>) 2003</p>
<p data-bbox="302 857 611 889"><a href="#">Advisory Statements</a></p> <p data-bbox="396 911 970 943">Remedying a Breach of Security (2010)</p>	<p data-bbox="1157 873 1539 1026">E-Health (Personal Health Information Access and Protection of Privacy) Act (<a href="#">E-Health</a>) 2008</p> <p data-bbox="1157 1047 1402 1079">Privacy Act 1985</p> <p data-bbox="1157 1101 1533 1247">Personal Information Protection and Electronic Documents Act (<a href="#">PIPEDA</a>) 2000</p>

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:

[practice@cotbc.org](mailto:practice@cotbc.org) or

Tel: 1 (866) 386-6822 (Toll free in BC)

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