



**College of  
Occupational Therapists  
of British Columbia**

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

# **Practice Standard #4: Disclosing the Occupational Therapy Record**

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## Practice Standards for Managing Client Information

# Practice Standard #4: Disclosing the Occupational Therapy Record



The occupational therapist will know and understand legislative obligations and organizational policies and procedures about making and releasing copies of client occupational therapy information.

The occupational therapist will respond to requests by stakeholders for access to and or copies of personal information in accordance with legislative obligations.

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.

## Practice Standards for Managing Client Information

### Practice Standard #4: Disclosing the Occupational Therapy Record, continued



#### Practice Expectations

1. If organizational policies do not exist or are insufficient, the occupational therapist will develop policies or protocols for stakeholder access to occupational therapy records in accordance with legislation, COTBC Bylaws, and other published COTBC documents.
2. The occupational therapist may disclose personal information under only those conditions outlined in COTBC Bylaw 79(1–2) and other relevant legislation.
3. The occupational therapist may refuse to provide copies from a client record or a portion of the client record under those conditions outlined in COTBC Bylaw 88(3) or other legislation (FOIPPA, PIPA) where a reason for refusal applies.
4. With client consent, the occupational therapist will allow another health professional external to the occupational therapist’s employment organization or agency to examine the client’s clinical record. The occupational therapist will also give a health professional any information from the record and which that professional is legally entitled to receive.

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## Practice Standards for Managing Client Information

### Practice Standard #4: Disclosing the Occupational Therapy Record, continued



#### Practice Expectations, continued

5. Where the client directs that part of the information be withheld, the occupational therapist will respect that request. If it is deemed reasonably necessary to disclose the withheld information for the provision of or to assist in the provision of health care to the client, the recipient must be notified that part of the information has been withheld.
6. The occupational therapist will record what information has been released to the client or others and when, and will inform these individuals of the use and disclosure of the client information.
7. The occupational therapist may charge a reasonable fee to cover costs for photocopying and, where appropriate, staff time in retrieving and reproducing the document (COTBC Bylaw, 88[5]).

## Practice Standards for Managing Client Information

# Additional Resources



College Resources	Links
<p data-bbox="302 646 657 683"><a href="#">Essential Competencies</a></p> <p data-bbox="396 737 989 813">Unit 5: Communicates and Collaborates Effectively</p>	<p data-bbox="1157 646 1533 756">Freedom of Information and Protection of Privacy Act (<a href="#">FOIPPA</a>) 1996</p> <p data-bbox="1157 776 1543 852">Personal Information Protection Act (<a href="#">PIPA</a>) 2003</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

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