



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.

Additional Resources

College Resources	Links
<p data-bbox="193 542 540 585">Essential Competencies</p> <p data-bbox="289 599 869 685">Unit 5: Communicates and Collaborates Effectively</p>	<p data-bbox="1062 542 1487 656">Freedom of Information and Protection of Privacy Act (FOIPPA) 1996</p> <p data-bbox="1062 671 1449 756">Personal Information Protection Act (PIPA) 2003</p>
<p data-bbox="193 756 502 799">Advisory Statements</p> <p data-bbox="289 813 850 856">Remedying a Breach of Security (2010)</p>	<p data-bbox="1062 771 1487 913">E-Health (Personal Health Information Access and Protection of Privacy) Act (E-Health) 2008</p> <p data-bbox="1062 928 1313 971">Privacy Act 1985</p> <p data-bbox="1062 985 1429 1142">Personal Information Protection and Electronic Documents Act (PIPEDA) 2000</p>

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