

# DOCUMENTATION and PROTECTION OF PRIVACY

## Standard

**Regulated members** are responsible to know, understand and follow the legislated requirements for the collection, use, management, and disclosure of protected health information.

## Expectations

The regulated member **must**:

- a) Create and maintain accurate, time bound, and up-to-date records of prescriptions, services/products rendered to **clients** and/or **patients** and maintain a written record of changes.
- b) Clearly communicate and document, any discussions with **regulated health professional** and colleagues regarding professional services, products, and patient treatment, including any changes.
- c) Ensure that clients and/or patient records are recorded legibly, in English, using clear understandable language.
- d) Ensure that all client, patient and financial records are stored in a manner that protects confidentiality through administrative, technical and physical safeguards.
- e) Understand and meet the requirements of the [Health Information Act](#) and the **custodian's**<sup>1</sup> policies and procedures for protecting patient's personal and health information.
  - i. Notify the custodian as soon as reasonable of any loss of individually identifying health information or any unauthorized access to or disclosure of individually identifying information.
- f) Use ethical and appropriate accounting and billing practices.
- g) Keep accurate financial records relating to the date of service, the type of service, fees charged for the service, the prescribing regulated health professionals, the patient and relevant payment information.
- h) Upon a written request of a patient, provide the patient with timely access to the patient's record in accordance with the *HIA*.
- i) Upon a written request, release service records to the client, or whomever the

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<sup>1</sup> Health Information Act s.1(1)(f)(ix) "custodian" a health services provider who is designated in the regulations as a custodian, or who is within a class of health services providers that is designated in the regulations for the purpose of this subclause.

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client directs, when authorized by the client.

- j) Ensure that all client, patient, and financial records are retained and accessible for a minimum of seven years, while maintaining confidentiality.

## Standards of Practice For Registered Dental Technologists and Registered Dental Technicians

### GLOSSARY

**Affiliate:** As defined by section 1(1)(a) of the [HIA](#), is an individual or organization employed by a custodian, or a person or entity that performs a service for a custodian as an appointee, volunteer, or student, or under a contract or agency relationship with the custodian. *See Also "Custodian"*.

**Client:** a dentist, denturist or other regulated health care professional who is authorized to prescribe and who is primarily responsible for the diagnosis and treatment of a Patient. The client is responsible for the final fit of any prosthesis, device, or appliance.

**Custodian:** An organization or entity defined in section 1(1)(f) of the [HIA](#) or designated in section 2 of the Health Information Regulation. Dental Technologists and Dental Technicians are designated as [affiliates](#) in the [Health Information Regulation](#).

**Must:** is used where the duty is compulsory.

**Patient:** an individual awaiting or receiving dental technology services and or treatment where the regulated member knew or reasonably ought to have known, that they were providing care to the individual and satisfies any of the following conditions listed below:

- I. The regulated member has charged or received payment from the individual or a third party on behalf of the individual.
- I. The regulated member has contributed to a health record or file for the individual.
- III. The individual has consented to oral health care services and or treatment by the regulated member.

**Regulated member(s):** a person who is granted registration as a member of the CDTA in accordance with the HPA and the Regulation.

This term includes a previously regulated member whose last day of registration with the College is within the immediately preceding two years.

**Regulated health professional(s):** is a person registered with a professional health regulatory professional college, agency and/or authority, in Alberta or any other jurisdiction, as a regulated.