



College of Traditional Chinese Medicine
Practitioners and Acupuncturists of Ontario

Ordre des praticiens en médecine traditionnelle
chinoise et des acupuncteurs de l'Ontario

STANDARD FOR RECORD KEEPING

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Version: 1.0

Standard for Record Keeping

Creating and maintaining records and reports are essential components of the professional practice of all R. TCMPs and R. Acs as records and reports provide information to other health care professionals about relevant aspects of patient care, treatment and assessment.

R. TCMPs and R. Acs must have the knowledge, skills and judgment to create and maintain a daily appointment log, patient files and billing records and other records that attest to the treatment of the patient. R. TCMPs and R. Acs must be proficient in maintaining records that describe workplace and safety procedures that have been carried out. R. TCMPs and R. Acs must be skillful in producing records and reports that are always accurate, complete, legible and timely.

Performance Indicators

R. TCMPs and R. Acs **must**:

- a) maintain a written or electronic daily appointment log that outlines the date, name, and the time of the appointment for each respective patient;
- b) create and maintain a comprehensive file for each patient in accordance with the record keeping guidelines established by the CTCMPOA;
- c) arrange and organize all material in patient records in a manner that allows for easy and prompt retrieval and ensures security and confidentiality;
- d) comply with all relevant legislation such as the Health Care Consent Act and all CTCMPOA guidelines pertaining to consent;
- e) comply with any privacy legislation such as the Personal Health Information Protection Act and all CTCMPOA guidelines pertaining to privacy;
- f) maintain complete and accurate records related to billing or payment for goods or services provided by the practitioner to the patient in accordance with the record keeping guidelines established by the CTCMPOA;
- g) maintain equipment and supply records to make determinations as to the equipment quality, serviceability and operability and take any corrective actions required to meet standards set by legislation, manufactures guidelines and all CTCMPOA guidelines pertaining to equipment;
- h) ensure that all electronic and written records are managed according to the principles and guidelines established by the CTCMPOA;

- i) implement record retention and destruction processes in compliance with the RHPA and all CTCMPAO guidelines pertaining to record retention and destructions; In addition R. TCMPs must:
- j) maintain an accurate inventory of herbs to record purchases, supply and prescriptions (TCM) to patients;
- k) ensure safe storage, labelling and handling of herbs to guarantee that the herbs will be kept free from contamination and that the herb quality is maintained in compliance with a legislation such as the Natural Health Products Directorate and the CTCMPAO policies and guidelines related to the safe management of herbal products;
- l) conduct appropriate quality control tests for all substances to be recommended in a treatment plan;
- m) take corrective action if the quality control tests are not within acceptable limits;
- n) only use herbs before their expiry time or date;
- o) ensure that all herbal prescriptions (TCM) are legible, and contain all of the necessary information to allow the prescription (TCM) to be accurately and safely dispensed (TCM), used and tracked.



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