



Private Practice Checklist

Determining whether to open or work in a private practice is a complex decision. Working in private practice requires occupational therapists (OTs) to reflect on their level of competence, knowledge of business practices, and their ability to manage their day-to-day practice while ensuring they are maintaining professional standards and meeting legislative requirements. It is an occupational therapist's responsibility to identify, research and determine if additional legislation is applicable to their private practice and how to comply with it. It is also an occupational therapist's responsibility to carefully consider their level of experience and competence in their area of practice prior to entering private practice.

The following checklist is meant to provide information for those occupational therapists wishing to enter or establish a private practice. It is not all inclusive; the reader may want to explore materials available from other regulatory organizations.

Legislative Requirements:

- OTs are regulated under the PEI Regulated Health Professions Act (RHPA) & Occupational Therapists Regulations. Note that OTs do not have access to any of the Reserved Activities outlined in the Act & the RHPA Reserved Activities Regulations.
- Other pertinent PEI legislation may include e.g. PEI Health Information Act, PEI Child Protection Act, PEI Education Act, PEI Workers Compensation Act, etc.

Standards & Guidelines:

- The Competencies for Occupational Therapists in Canada were adopted by the College and replace the Essential Competencies for Occupational Therapists in Canada, 3rd Edition.
- The four College Practice Standard/Guidelines are: Code of Ethics, Record Keeping, and Task Assignment and Supervision of Occupational Therapy Assistants (revised).

Professional Requirements:

- The PEICOT Record Keeping standard includes information on confidentiality & security, retention & destruction, discontinuation or transfer of practice and financial records.
- Professional liability insurance provides adequate coverage for all aspects of their practice.
- Identify existing or anticipated conflict of interest situations when establishing a private practice e.g. work in both public and private settings.
- How is consent managed? How is confidentiality of conversations, materials and records ensured?
- Who is the client? PEICOT would define the client as the person being assessed (whether in person or not) and/or treated and the person for whom the occupational therapy services, recommendations or professional opinions apply.

Other:

- PEICOT does not set fees for private practice; however, the expectation is that fees will be fair, equitable and transparently communicated upfront to clients.
- Are policies/procedures/guidelines needed for a) infection control e.g. cleaning & sterilization of equipment, b) professional boundaries e.g. working in client’s or their own home/clinic, c) business practices e.g. hours of work and/or the use of electronic communication, etc.?
- If selling or recommending products, occupational therapists are accountable for ensuring they are knowledgeable about the product safety and use with a particular client population. Occupational therapists should provide information about the products, including the cost, and provide alternative options to clients if they wish to purchase the product from other vendors.
- If closing a practice – succession planning should include management of any client records.

Please contact the Registrar at rbregistrar@peiot.org if you have any questions.

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