



EVIDENCE-BASED CLINICAL PRACTICE GUIDELINE

TELEHEALTH

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Tele-Optometry and Emerging Technology Clinical Practice Guideline

The objective of this Clinical Practice Guideline (CPG) is to provide guidance to Doctors of Optometry on the appropriate use of tele-optometry services and telehealth platforms. The College's role is to regulate its members on the use of tele-optometry, and not the technology itself. It is based on the best available and most current optometric and medical clinical evidence and research. It is not intended to replace professional discretion and judgment; nor is it intended to be used as an all-encompassing clinical manual.

Advancing technologies are enabling more indirect and remote methods for delivering consultative, diagnostic, management, and treatment services. Therefore, clinicians must tailor their assessments, diagnoses, management, and treatment plans to meet the patient's specific needs at that moment.

Tele-optometry means the provision of optometric consultation, diagnosis, management and treatment services through electronic communication with:

- Patients
- Inter-Professional Consultations
- Intra-Professional Consultations

The Alberta College of Optimetrists (ACO) supports the use of the telehealth services for Albertans between optimetrists and ophthalmologists in appropriate circumstances, provided that:

- Both practitioners are registered with and meet the Standards of Practice and Clinical Practice Guidelines for their respective regulatory colleges (ACO and CPSA).
- Patient privacy rights are protected.
- Patients retain the right to access the practitioner (e.g. optometrist/ophthalmologist) of their choice.
- Practitioners always act in the best interests of the patient; and, only provide appropriate and optimal health care services.

Goals:

When considering the use of telehealth services, every optometrist should strive for the following:

- 1. Identify those patients who may benefit from telehealth services.**
- 2. A regulated optometrist providing tele-optometry services must do so to the same standards in which they provide in-person care.**
- 3. Collaborate and communicate with patients, legal guardians and/or other health care practitioners in order to:**
 - a. Increase access to competent vision care services,**
 - b. Maximize a patient's visual status and quality of life,**
 - c. Improve patient compliance and outcomes,**
 - d. Reduce the possibility of duplication of tests and services, and,**

- e. **Provide vision care services in the most efficient and effective manner.**

Specific Guidelines

1. **Use an appropriate and secure platform to provide tele-optometry services.**
 - a. **If required, submit an update to their Privacy Impact Assessment (PIA) with the Office of the Information and Privacy Commissioner of Alberta (OIPC).**
 - b. **The OIPC regularly reviews software and communications methods for privacy compliance**
2. **Provision of tele-optometry services establishes an optometrist-patient relationship**
 - a. **The optometrist must provide:**
 - i. **Their identity, location, and licensure status to the patient.**
 - ii. **Take appropriate steps to confirm the identity, and location of the patient.**
 - iii. **Disclose any fees with tele-optometry services**
 - iv. **Collecting sufficient information in order to provide services in a safe and competent manner.**
3. **For the provision of all telehealth services, the optometrist must:**
 - a. **Document the patient encounter and ensure that all health information is collected, protected, maintained, used, corrected, amended and disclosed in an appropriate, lawful and confidential manner.**
 - b. **Obtain and document verbal or written consent with the patient to provide optometric services via telehealth. Obtain and document verbal or written consent for providing optometric services via telehealth with all other health care practitioners involved in the provision of the telehealth services.**
 - c. **Be prepared to provide appropriate follow-up care when required.**
 - d. **Be prepared to refer the patient to another practitioner for additional testing, management or treatment when the patient's condition requires a referral to another health care practitioner.**
 - e. **Only include the minimum necessary amount of personal information in text and/or email messages in order to provide the service in a safe and competent manner.**

Optometrists play a vital role in ensuring accurate and comprehensive vision care. To uphold the highest standards of patient safety and care, optometrists must conduct a thorough evaluation before issuing an optical or pharmaceutical prescription.

A refraction, when performed alone, does not provide sufficient information to design and issue an appropriate prescription for vision correction. Therefore, optometrists should personally conduct or oversee a comprehensive examination that includes refraction, as well as an assessment of ocular and systemic health, binocular vision, accommodative status, and the patient's visual environment and demands.

1. **Optometrists must not supervise a remote or on-line refraction; or, issue, generate or sign an optical prescription derived from a remote or on-line refraction.**

When issuing, generating, or signing a pharmaceutical prescription—whether electronically or by other means—optometrists must:

- Obtain an appropriate history and conduct a comprehensive examination sufficient to establish a diagnosis and identify underlying conditions.
- Assess the impact of ocular and systemic health conditions, binocular vision, accommodative function, and the patient's occupational and recreational visual needs.
- Ensure that no absolute contraindications exist for the recommended or prescribed treatment.
- Engage in an informed discussion with the patient, outlining the risks, benefits, and appropriate follow-up measures.

Optometrists may issue a prescription without meeting the full scope of these requirements under specific circumstances, such as:

- Providing emergency treatment.
- Consulting with another optometrist or healthcare provider who has an established relationship with the patient and agrees to oversee the patient's ongoing care.
- In an on-call or cross-coverage situation where the prescribing optometrist has access to the patient's medical or optometric records.

By adhering to these guidelines, optometrists can ensure the highest level of patient care while maintaining professional integrity and regulatory compliance.

Jurisdiction:

Tele-optometry services delivered must follow all relevant legislation, regulations, and standards in the jurisdiction where both the patient and the optometrist are located. Should there be disparity, the optometrist should act in accordance with the regulations where the patient is located. Optometrists who practice telehealth for a patient located in Alberta must:

- Be a member in good standing and hold an active Alberta College of Optometrists Practice Permit.
- Adhere to the ACO Standards of Practice, Guidelines to the ACO Standards of Practice and ACO Clinical Practice Guidelines.
- Maintain proper professional liability insurance that covers the provision of telehealth services.

- Abide by the legislative scope of practice as outlined in the Alberta *Optometrists Profession Regulation*.
- Abide by all Alberta and Federal privacy legislation requirements.
- Have sufficient clinical and technological training and competency to manage patients appropriately via telehealth.

Alberta optometrists who practice telehealth for patients located outside of Alberta must comply with the licensing and registration requirements of the jurisdiction in which the patient is located. See chart below for visual representation.

Where is the Optometrist registered?	Where is the patient located?	Action Required
Alberta	Alberta	No additional regulatory or registration action required for optometrists already registered and practicing in Alberta.
Alberta	Outside of Alberta	Contact the appropriate regulatory body in the jurisdiction where the patient is located to determine registration requirements.
Outside of Alberta	Alberta	The ACO has mandatory registration requirements for all optometrists who are practicing within the scope of optometry in Alberta.
Outside of Alberta	Outside of Alberta	No action required as the ACO does not have jurisdiction over optometrists registered in other jurisdictions and seeing patients outside of Alberta.

Acknowledgements:

College of Physicians and Surgeons of Alberta (CPSA): Standards of Practice - Virtual Care

College of Optometrists of Ontario (COO)

Federation of Medical Regulatory Authorities of Canada (FMRAC)- Telemedicine and Refraction Guidelines