

Evidence-Based Clinical
STANDARD OF PRACTICE

Laboratory Testing

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ALBERTA college of OPTOMETRISTS

Laboratory Testing Clinical Practice Guideline

The objective of this Clinical Practice Guideline (CPG) is to provide guidance to Doctors of Optometry on ordering and analyzing laboratory tests. 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. Clinicians must base their diagnostic, management, treatment and referral regimens on the specific needs of the patient.

We wish to acknowledge the Alberta College of Pharmacy for their previously published Laboratory Testing Standard of Practice used in the development of this CPG.

Laboratory tests analyze samples of blood, urine, substances and/or other tissues. They can be used to:

- Initially diagnose a disease or condition
- Assist in the on-going management of a disease or condition
- Assist in evaluating a patient's response to a treatment, and,
- Provide valuable information on the long-term monitoring of a disease or condition.

Objectives

In identifying patients who require laboratory testing an optometrist must:

- **Ensure the appropriate test is ordered and analyzed**
- **Avoid duplication of laboratory testing**
- **Ensure appropriate follow-up**
- **Share patient information in an appropriate and confidential manner with other members of the patient's health care team**

1. **Optometrists should collaborate and communicate with patients, legal guardians and other health care practitioners in order to:**
    - **Increase access to competent vision care services,**
    - **Maximize a patient's visual status and quality of life,**
    - **Improve patient compliance and outcomes,**
    - **Reduce the possibility of duplication of tests and services, and,**
    - **Provide vision care services in the most efficient and effective manner.**

Permitted Registrants

1. **The following optometrists are authorized to order and analyze laboratory tests:**
    - **Optometrists who graduated after January 1, 2015 and passed the OEBC exam; and/or,**
    - **Optometrists who graduated prior to January 1, 2015 and have successfully completed a certification course on laboratory testing recognized and approved by the ACO Council.**

Specific Guidelines

1. **When laboratory testing is clinically indicated, an optometrist should ensure it is obtained, either by ordering it or by asking another health care provider to order it. Optometrists must only order those laboratory tests that they are personally competent to order, interpret and use to achieve appropriate patient outcomes.**
    - **An optometrist may ask another health care provider to order a test if they are not competent to order or interpret it, or are otherwise unable to order it.**
    - **Optometrists must follow the test utilization criteria and ordering requirements set by the laboratory.**

2. **To avoid duplication and support accurate interpretation, optometrists must review all available current and previous laboratory test results before ordering a test for the patient. Sources may include Alberta Netcare, Connect Care, the patient's electronic health record, or communication with another health care practitioner.**

    a. Optometrists who order tests through community (publicly funded) laboratories must have access to Alberta Netcare or another provincial health record system and review it before ordering.

    b. Where testing is done through a private laboratory, optometrists should still review previous results when they are available.

3. **Complete the "Copy to" area on the laboratory requisition if the results are required at another location-or by another practitioner. The "Copy to" area must clearly indicate the complete practitioner's name (full first and last name) and full address in order to ensure delivery of results.**

    a. Specimens must be collected, labelled, stored and transported in accordance with the laboratory's instructions for the specific test.

    b. Ocular specimens must be labelled with the eye (right or left) and the site of collection, and a separate swab must be used for each eye.

4. **Optometrists must use their professional discretion and judgment to review and interpret laboratory test results in the context of the individual patient.**

    - **Interpretation should consider patient-specific factors (such as medications, pregnancy, systemic disease, organ function, substance use, diet, genetics and the timing of the test), as well as the patient's history and examination findings.**
    - **Clinically significant results must be communicated to the patient or legal guardian. At the time of ordering, the optometrist should tell the patient whether and how normal results will be communicated.**

NOTE: ***Reference to a physical exam is not intended to imply that the optometrist must conduct a physical exam beyond that involving assessment of the visual system, the eye, and its associated structures. The optometrist may need to gather information regarding the results of a physical exam from the patient or another health care provider.***

5. **Optometrists must only order laboratory tests where clinically indicated to assist in the diagnosis management of a condition of the eye or visual system, including systemic conditions with ocular manifestations.**
    - **Optometrists must only order laboratory tests for their own patients.**
    - **Optometrists must not order laboratory tests for themselves or their immediate family members.**
    - **Optometrists should not order laboratory tests without a clinical indication, including for screening populations with whom there is no optometrist–patient relationship.**

6. **The optometrist who orders a laboratory test is responsible for reviewing, interpreting and acting on its results. Optometrists who order laboratory tests must have a reliable process in place to track ordered tests and act on their results in a timely manner.**
    a. **Where a laboratory test is necessary for diagnosis or treatment and the result has not been received within a reasonable period of time, the optometrist should follow up with the laboratory and/or the patient to determine the status of the order.**

7. **Optometrists must take appropriate action on laboratory test results, whether normal or outside the expected range. Appropriate action may include, but is not limited to:**
    - **Discussing the results with the patient, legal guardian and/or other members of the patient's health care team;**
    - **Developing and implementing a plan for ongoing monitoring;**
    - **Changing drug therapy, if authorized to do so; or, recommending changes to drug therapy to another member of the patient's health care team;**
    - **Consulting with clinical/medical laboratory staff regarding unexpected or unusual results;**
    - **repeating the test where a result is unexpected, may be in error, or is needed for monitoring; and,**
    - **referring the patient to their family physician or an appropriate specialist where the results indicate a condition outside the optometrist's scope of practice.**

8. **Optometrists who order laboratory tests must have a process in place to receive and act on critical results, including results reported outside regular office hours.**
    a. **Optometrists must be available to respond to critical results, or have alternate arrangements in place with a practitioner who is able to receive and act on them.**
    b. **Optometrists are encouraged to consider arrangements such as on-call groups with other optometrists or physician colleagues to meet this requirement.**
    c. **The contact number provided to the laboratory must allow critical results to reach the optometrist, or their alternate, in a timely manner.**
    d. **Instructions for after-hours care should be available to patients who call the office and on the practice's website.**

9. **Optometrists who order laboratory tests, or make decisions as a result of interpreting laboratory test results must:**
    - **Document the test ordered, the indication for it, and the result in the patient's record of care;**
    - **Explain the interpretation of the data, the decision and the rationale to the patient or legal guardian if it is appropriate to do so; and,**
    - **Include a reference to the laboratory data and the decision in any communications with other members of the patient's health care team.**

10. **Optometrists must protect the confidentiality of laboratory test results. Optometrists may collect, use and disclose laboratory test results only when they are relevant to the care being provided, and only in accordance with the *Health Information Act* (HIA), other applicable privacy legislation, and the standards governing optometric practice.**
    a. **Collection, use and disclosure must be limited to the least amount of information, with the highest degree of anonymity, needed for the intended purpose (HIA ss. 57–58).**
    b. **Requirements for consent, disclosure, and access to and use of the Alberta EHR (Netcare) are set out in the *Health Information Act* and its regulations.**

11. **Patients may ask an optometrist for access to their health information in the Alberta EHR (Netcare), including laboratory results ordered by other health care providers. Under section 56.61 of the *Health Information Act*, an optometrist who is an authorized custodian and has provided health services**

to the patient may respond to the request, and Part 2 of the Act (access to health information) applies.

- **a. In responding, the optometrist must apply the exceptions in section 11 of the Act. The optometrist may refuse to disclose information where disclosure could reasonably be expected to result in immediate and grave harm to the patient's mental or physical health or safety, threaten the mental or physical health or safety of another individual, or pose a threat to public safety.**
- **b. If the optometrist is unable to provide access, they should tell the patient that they may make the request to the Department of Health (HIA s. 56.61(2)) or to the health care provider who ordered the test.**
- **c. Any interpretation of results ordered by another provider is subject to Specific Guideline 12.**

12. Optometrists must not interpret laboratory test results ordered by another health care provider for the patient unless the results are relevant to the care the optometrist is providing.

- **a. In all other cases, the patient must be referred to the health care provider who ordered the test for interpretation.**
- **b. If an optometrist reviewing another provider's results identifies a finding that appears clinically significant and may not have been acted on, the optometrist should communicate with the ordering provider or advise the patient to follow up promptly.**