

Dispensing Guidelines

It is the responsibility of the optician to dispense optical devices to **patients**¹ appropriately and ethically. Further information on the record keeping and documentation regarding **dispensing** can be found in the College of Opticians of Alberta (COA) *Recordkeeping and Documentation Guidelines*.

Supervision Requirements

A provisional optician must ensure they are being supervised. This can be direct or indirect supervision of the **opticianry services** they provide, as appropriately determined by the supervisor. More information can be found in the COA *Dispensing Restricted Activity Standards*. A provisional optician must ensure they have identified and documented who is supervising them at the time of services provided as per the standards.

An optician providing supervision may wish to consider a co-signature or another form of documentation on the patient record to identify themselves as the supervisor at the time services were provided by the provisional optician.

Equipment Requirements

The minimum requirements for equipment for various services are as follows:

Dispensing Eyeglasses:

The minimum requirements for equipment for various services are as follows:

- Lensometer or other device for measuring the power of a lens
- Device for measuring the pupillary distance of a patient (pupilometer or pd ruler and penlight)
- Device for measuring the segment or fitting cross height for multifocal lenses
- Lens gauge/clock
- PD ruler
- Thickness calipers
- Tool to measure vertex distance
- Adjustment and bench tools
- Frame heater
- Visual acuity charts
- Tolerance chart
- Frame and lens cleaning products

Low Vision Assessment:

- Near diagnostic magnification aids
- Distance diagnostic magnification aids
- Distance and near low vision charts

The standard magnification powers to determine a patient's near needs are 2X, 4X, and 6X. For distance, patients usually require assistance with an intermediate distance, TV distance and infinity distance.

Contact Lens Fitting:

¹ Words in bold font are listed in the glossary.

- An instrument for measuring corneal curvature (keratometer/ophthalmometer)
- Slit lamp biomicroscope
- Lensometer
- Access to suitable diagnostic trial contact lenses
- Disinfection equipment/solution
- Appropriate solutions, currently dated, for caring for contact lenses
- Visual acuity charts
- Sodium fluorescein

If fitting rigid contact lenses, the dispensing facility must also have:

- Radiuscope or another tool to measure base curve
- Means to assess surface and edges of rigid lenses
- Trial lenses, or access to trial lenses for rigid lens fitting
- Other as required for level of services being offered
- Sodium fluorescein

Dispensing or Re-fitting of Eyeglasses

When dispensing eyeglasses, an optician should use best practices and routinely do the following:

- evaluate every optical prescription and advise patients of suitability of lenses and frames with the knowledge of occupational needs, hobbies, and cosmetics;
- evaluate every optical prescription and advise patient of suitability of lenses and frames with knowledge of optics and geometric physics applied to the product purchased;
- advise patients of the consequences of changes in their prescription regarding expectation for new eyewear purchased;
- analyze changes in prescriptions regarding medical complications indicated;
- endeavour to meet a patient's need and expectations regarding safety, aesthetics, and price;
- take all required and other appropriate measurements related to eyeglasses and note them accordingly on a patient's record;
- provide training and information as needed about use, care, and follow up of optical devices;
- provide follow up care including adjustment and advice to make wear easier and maintenance more effective;
- be able to recall or locate applicable information in detail on the patients' eyeglasses
- recognize anomalies in prescription and wearing success and refer a patient to another regulated health professional if required;
- evaluate every pair of eyeglasses to verify the accuracy of the completed product to ensure they are as ordered and within tolerance (the COA defers to the American National Standards Institute [ANSI] ANSI Z80.1, Prescription Ophthalmic Lenses-Recommendations).
- in the case of safety eyewear, adhere to appropriate safety standards (the COA defers to the American National Standards Institute [ANSI] ANSI Z87.1 American National Standard for Occupational and Educational Personal Eye and Face Protection Devices).
- ensure that the practice environment has appropriate tools and equipment; and
- ensure that patient records are complete.

Verifying and Dispensing Eyeglasses

At the time of dispensing, an optician must verify the suitability of the optical device. They must verify that:

- the patients' needs have been identified and discussed
- vision requirements have been appropriately met
- limitations of optical devices regarding a patient's prescription or visual condition have been discussed
- the patient understands the necessity of and availability of follow up care
- optical devices have been verified for quality, specifications, and are within tolerance (the COA defers to the American National Standards Institute [ANSI] ANSI Z80.1, Prescription Ophthalmic Lenses-Recommendations), and
- the patient record is complete.

Verifying and Dispensing Low Vision Devices

An optician must be authorized to provide this service and should use best practices and routinely do the following:

- review with the patient any relevant environmental, occupational, avocational, and/or physical factors
- review any referral or prescription details in accordance with the Standards
- advise the patient regarding appropriate low vision device(s)
- take necessary measurements
- verify the accuracy of any device to ensure it meets applicable tolerances
- fit and adapt the device to the patient
- counsel the patient on aspects of device usage including expectations, limitations, usual adaptation period, and maintenance requirements.

Contact Lens Fitting

When an optician is completing a contact lens fitting, the optician must be authorized to do, use best practices, and routinely do the following:

- take a patient history and determine suitability of a patient for contact lens wear, including:
 - the health of the cornea, conjunctiva and lids, and integrity of the tear layer
 - baseline visual acuity, corneal curvature, clarity, and integrity
 - relevant environmental, occupational, avocational, and systemic health focus
- counsel a patient about the effects that contact lens wear may have on the health of the eye including advantages, risks of complications and limitation of contact lens wear;
- determine what lenses are appropriate for a patient and evaluate the initial contact lenses on a patient's eyes. Subsequent modifications of the contact lens parameters must be made as required based upon factors that may include, but are not limited to:
 - lens appearance and fitting
 - comfort with diagnostic lens in place
 - corneal clarity and integrity
 - conjunctival and lid appearance
 - tear characteristics
 - monocular and binocular visual acuity
 - replacement schedule
- verify the accuracy of the contact lenses to ensure they are as ordered and within tolerance;
- provide and record any relevant details of instructions or recommendations to a patient with respect to:
 - hygiene
 - lens insertion and removal
 - lens care

- recommended wearing times and replacement schedules
 - normal and abnormal adaptive symptoms
 - contraindications to lens use
 - progress evaluations
 - how and when to access emergency care
- develop an appropriate ongoing patient management plan. This includes determining when a patient should return for an assessment of lens performance, adaptation, and compliance; for contact lens refills or replacement; or for further evaluation
- record the results of all evaluations performed and all recommendations provided to a patient
- once all services required to dispense contact lenses have been completed, the patient record should include complete contact lens specifications. Contact lens specifications must include:
 - patient's name
 - name and license number of the optician who performs the fit
 - contact information for the optician who performs the fit
 - date issued
 - expiration date (this is left to the professional judgement of the optician who performs the fit based on their findings during the fitting)
 - brand name, base curve, diameter, and power of the contact lens(es)
 - replacement schedule
 - recommended contact lens solution
 - any other specifications the optician who performs the fit deems necessary based on the prescription, type of lens, condition of the patient, etc.

Continuing Care Contact Lenses

When an optician is providing continuing care to assess an established contact lens patient, they must be authorized to perform this, use best practices, and routinely do the following:

- review the ongoing patient management plan, considering factors as:
 - any changes in the patient's eye health or other relevant circumstances
 - time elapsed since the patient last met with an optician, optometrist, or ophthalmologist in person
 - changes to occupation or other needs
- review as appropriate:
 - the age, wearing, and replacement schedule of current contact lenses
 - the efficacy of the current lens care regime
 - any adverse reactions associated with contact lens wear
- assess a patient to determine relevant factors, including:
 - lens appearance and fit
 - wearing time
 - comfort with lenses in place
 - corneal clarity and integrity
 - stable corneal curvature
 - conjunctival and lid appearance
 - tear characteristics
 - visual acuity
 - compliance with recommendations on lens handling, care, and replacement
 - provide and implement management plans for any issues identified, making recommendations for further care and counsel a patient as necessary

- ensure the contact lens specifications are up to date on the patient record

Verifying and Dispensing Contact lenses

An optician must be registered with the COA in accordance with the regulations to be authorized to dispense contact lenses.

When a patient requests contact lenses be dispensed by the optician who performed their contact lens fitting, that optician must take responsibility for the accuracy of the fitting and the resultant contact lenses dispensed.

When a patient requests contact lenses be dispensed by an optician who did not perform their contact lens fitting, that optician may use contact lens specifications provided by a qualified ophthalmologist, optometrist, or optician to dispense the contact lenses. That optician must take responsibility for the accuracy of the contact lenses dispensed in relation to the contact lens specifications.

An optician may decline to dispense contact lenses based on contact lens specifications from a qualified ophthalmologist, optometrist, or optician if their professional judgement deems any aspect of the specifications to be inappropriate for the patient. Best practice would be for the dispensing optician to consult the prescribing ophthalmologist, optometrist, or optician to ensure that there is no relevant information in the patient record that may contravene the dispensing based on the contact lens specifications provided.

When dispensing contact lenses based on the contact lens specifications from another regulated health professional, an optician must ensure patient records are complete.

Contact Lens Fittings

When an optician is completing a contact lens fitting, the optician must be authorized to do, use best practices, and routinely do the following:

- Other
 - Date of each service/transaction and what each transaction included
 - Identifier for the optician who performed each service/transaction or supervised a student performing the service
 - Record of any release of information to any party, including the patient or another regulated health profession (including date, reason, who the information was released to, and authorization from the patient if needed)
 - Record of any payments including third party billing

Glossary Terms

Dispensing: the act of designing, preparing, fitting, adjusting, verifying, or supplying optical devices

Low vision device: specialized equipment designed to help individuals with significant visual impairments. They include a variety of tools such as magnifiers, telescopes, and electronic aids. The goal of low vision devices is to provide greater independence and facilitate daily activities for those with low vision

Opticianry service: a service that comes within the practice of the regulated opticianry profession. In their practice, opticians do one or more of the following:

- Based on an optical prescription, design, supply, prepare, adjust, and dispense optical appliances and prostheses, including corrective lenses;
- Promote eye health and the correct use of optical appliances and prostheses through education of consumers and regulated members;

- Perform refractions and identify the need for corrective lenses;
- Conduct or collaborate in optical related research;
- When providing professional services referred to in this section, conduct assessments and make referrals where appropriate;
- Provide restricted activities authorized by the regulations.

(HPA, 2000, Opticians Professions Regulation, 2011)

Patient: a person, or caregiver of a person, receiving professional services from a registrant of the College

Related Documents

College of Opticians of Alberta *Dispensing Standards*

College of Opticians of Alberta *Recording Keeping and Documentation Guidelines*

For more information:

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