

Therapeutic Relationships and Professional Boundaries Guidelines

What is a therapeutic relationship?

A therapeutic relationship is the professional relationship between an optician and their **patient**¹ that involves trust and respect. This relationship contributes to the patient's health and well-being. There are many factors that affect the therapeutic relationship, including:

- Money: the optician is paid to provide opticianry services to the patient
- Length of time: the relationship lasts the duration of the opticianry services and vision care needs and six months beyond the last opticianry service provided (see *Professional Boundaries Standards*)
- Location: the relationship is limited to the practice setting where they provide professional opticianry services
- Purpose: the relationship is established and maintained to fulfill the opticianry needs of the patient.
- Power balance: opticians are empowered by their professional skills and knowledge and have access to private and personal health information of their patients. They have the power in the therapeutic relationship.
- Responsibility: opticians are responsible for establishing and maintaining the therapeutic relationship.

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Professional Boundaries

Professional boundaries are the limits between a professional and personal relationship that protect the patient from harm. It is the optician's responsibility to establish professional boundaries with the patient. Healthy professional boundaries protect the therapeutic relationship and allow for mutual respect.

Boundary Crossings

Boundary crossings are brief steps across boundaries that may be accidental or purposeful, if done to meet the patient's needs. Boundary crossings may be acceptable if used for clinical purposes and kept to a minimum. Opticians must be aware that these crossings could result in role confusion and increased vulnerability for the patient. Opticians must re-establish the boundaries after the brief crossing. Some instances of boundary crossings may include:

Type of Boundary Crossing	Things for Opticians to Consider
Cultural Differences: Opticians may briefly cross professional boundaries to accommodate a patient and ensure are comfortable by respecting cultural differences.	<ul style="list-style-type: none"> • Learn about people who are different from you and allow those lessons to inform your opticianry practice • Remember that the patient is the expert of their own experience. • Remain humble and open to learning. • If in doubt, politely ask the patient about their needs. • Acknowledge and honor how the patient wishes to be referred as. • Reserve your opinions about a patient's beliefs, backgrounds, and lifestyle.
Gifts:	<ul style="list-style-type: none"> • Follow workplace policies on gifts.

¹ Words in bold font are listed in the glossary.

<p>Gift giving and receiving can blur the line between a personal and professional relationship.</p>	<ul style="list-style-type: none"> • Be clear on why you cannot accept a gift or favor. Explain your professional boundaries requirements and that you are obligated to treat patients equally. • Be aware that gifts may be given with ulterior motives. • Accepting gifts could be viewed as fraud or theft by family members or the government, especially if the patient is vulnerable due to age or other factors. • Never seek/accept monetary gain from patients beyond the cost of the opticianry service provided.
<p><i>Over-familiarity:</i></p> <p>As your patient relationship develops over time, it is still the optician's responsibility to maintain professionalism and boundaries. Sharing personal information about yourself or offering services beyond your role may be perceived as crossing this boundary.</p>	<ul style="list-style-type: none"> • Continue to ask how patients prefer to be addressed. Avoid terms of endearment. • Avoid going out of your way to assist a specific patient, even if they request to see you, when other staff are available. • Be cautious when talking to patients about your personal life. • Remain clear about the boundaries of communication. If you are uncomfortable with a conversation, politely change the subject or inform the patient that you do not wish to discuss a particular topic.
<p><i>Family and Friends:</i></p> <p>If you have a personal and a professional relationship with a patient, you may not be able to maintain objectivity in their treatment.</p>	<ul style="list-style-type: none"> • Encourage family and close friends to seek out another optician who can meet their needs. • In emergency situations where treating a family member or friend is unavoidable, document the consent of the patient, along with the reason why the situation was unavoidable. • If you work in a rural or remote community where dual relationships are unavoidable, document the consent of the patient and why the situation was unavoidable.

Boundary Violations

Boundary violations occur when a behaviour becomes unacceptable because the outcomes benefit the optician over the needs of the patient. These behaviours move the therapeutic relationship from a professional one to a personal one, may be intentional or unintentional, and may occur when opticians don't recognize their own boundaries or don't understand the patient's boundaries. It is important to remember that it is how the patient perceives the behaviour that matters, not the intent of the behaviour.

The College of Opticians of Alberta (COA) *Professional Boundaries Standards* identify the requirements for opticians with respect to professional boundaries.

Other guidelines to assist in decision-making

As much as possible, opticians should maintain a professional relationship with the patient to ensure it stays a therapeutic relationship. The following may assist the optician in maintaining those boundaries:

- Be aware of your own behaviour. Ensure your actions are within your scope of practice and follow all legislation and standards of practice.
- Speak with a coworker, supervisor, or the College if unsure about a boundary.
- Lead by example. By modeling appropriate behaviour, the optician maintains control over the interactions with the patient.

- Re-establish boundaries. Check in with the patient about their boundaries often and be consistent about enforcing your professional boundaries.
- Keep a record. Opticians should document each interaction. This can help provide clarity of the situation should any further conversation become necessary.

Glossary Terms

Patient: a person receiving opticianry services from a regulated member of the College

Related Documents

College of Opticians of Alberta *Professional Boundaries Standards*

College of Opticians of Alberta *Code of Ethics*

References

College of Opticians of British Columbia. (2024). *Standard 8: Dispensing of vision appliances*.
Retrieved from: <https://chcpbc.org/for-professions/opticians/resources/>

College of Registered Nurses of Alberta. (2022). *Professional Boundaries: Guidelines for the Nurse-Client Relationship*. Retrieved from: <https://nurses.ab.ca/protect-the-public/standards-for-rns-and-nps/guidelines/>

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