

Recordkeeping

Practice Resource

Effective: April 1, 2026



BCCOHP Standards Framework

The British Columbia College of Oral Health Professionals' (BCCOHP's) Standards Framework includes standards and practice resources:

STANDARDS

Standards are the minimum professional, ethical and practice requirements for oral health professionals to deliver safe, competent oral health care.

PRACTICE RESOURCES

Practice resources provide additional information and resources for adjunctive aspects of practice.

This **practice resource** is written for all team members involved in the provision of oral health care and should be read and understood alongside BCCOHP's [Standards for the Oral Health Team \(PDF\)](#).

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Introduction

BCCOHP's *Standards for the Oral Health Team* are the minimum professional, ethical and practice requirements for oral health professionals. They include practice standards for recordkeeping, which apply to all [practice records](#) regardless of the format (physical or electronic) or where they are located and/or stored. This practice resource provides additional information and resources to facilitate understanding of (and compliance with) recordkeeping standards within the *Standards for the Oral Health Team*.

Purpose

A complete and accurate record assists oral health professionals in planning and providing safe and effective oral health care. Records enable health professionals to ensure continuity of care and to collaborate effectively with other health professionals in support of patient care. Patient records should be a true representation of what occurred during the patient's care. Records may be used in investigations including forensic, regulatory, and other; and in regulatory processes such as quality assurance.

Risk

Recordkeeping is an adjunctive aspect of practice which may be high risk. Compromised information can impact patient care leading to negative health outcomes. Inappropriate or inadequate collection, use, access, modification, retention, disclosure, and disposal put patients' personal information at risk.

Custodianship of patient information

Custodianship refers to the responsibility of maintaining and managing of patient information. All oral health professionals involved in patient care are considered [custodians](#) of patient information contained within records. BC's *Personal Information Protection Act* legislates the requirements for information protection that apply to private organizations such as oral health offices, laboratories and non-hospital facilities. Other relevant legislation includes but is not limited to the *Personal Information Protection and Electronic Documents Act*, *Privacy Act*, *Access to Information Act*, and BC's *Freedom of Information and Protection of Privacy Act*.

Custodianship of *patient information* is distinguished from *record ownership* and business interests. Under common law, and in the absence of an agreement to the contrary, records belong to the practice owner. The owner is responsible for complying with relevant legislative requirements such as the retention period set out by BC's *Limitation Act*.

Ultimately, patients own the personal and health information in their records.

Standards and patient outcomes

There are three standards from BCCOHP’s *Standards for the Oral Health Team* that provide recordkeeping expectations:

- **2.4** You must make and maintain complete and accurate records
- **1.6** You must keep your patient’s personal and health information confidential and secure.
- **1.9** You must ensure timely and secure [access](#) and [transfer](#) of records.

The standards are listed below along with corresponding patient outcomes and performance indicators.

Note: Terminology is hyperlinked to the [Glossary](#) within the text.

As oral health professionals, you must meet the following standards for recordkeeping:

Standard 2.4	As a patient or member of the public, you can expect:
You must make and maintain complete and accurate records.	That your personal and health information is accurately recorded, complete, and maintained.

Performance indicators for standard 2.4

- **2.4.1** You ensure that records relevant to your practice are appropriate, comprehensive, timely, and up to date.
- **2.4.2** You only collect and use relevant patient information necessary for your practice.
- **2.4.3** You ensure that records are a clear and objective account of the services provided, communications including [informed consent](#) discussions, and [interactions](#).
- **2.4.4** You ensure that all records are appropriately labelled and dated and clearly identify the [provider](#)(s) of services.
- **2.4.5** You ensure amendments and corrections preserve the original information.
- **2.4.6** You maintain business records in accordance with applicable legislation.
- **2.4.7** You retain all records in accordance with applicable legislation.

Standard 1.6	As a patient or member of the public, you can expect:
You must keep your patient’s personal and health information confidential and secure.	That your personal and health information remains confidential and is not shared without your consent.

Performance indicators for standard 1.6:

- **1.6.1** You protect patient information in compliance with applicable legislation.
- **1.6.2** You discuss patient information privately and ensure personal and health information is not accessed overheard or shared with those not involved in your patient’s care either verbally or through any other medium.
- **1.6.3** You only [disclose](#) necessary and relevant patient information when required by law or with your patient’s consent.
- **1.6.4** You ensure that all members of the oral health team and staff are aware of the importance of patient confidentiality and keeping information private.
- **1.6.5** You dispose of records, including electronic records, in a secure manner that ensures records cannot be reconstructed.
- **1.6.6** You take appropriate steps/action should a [privacy breach](#) occur.

Standard 1.9	As a patient or member of the public, you can expect:
You must ensure timely and secure access and transfer of records.	That you have secure access to your records.

Performance indicators for standard 1.9:

- **1.9.1** You provide your patient or authorized party with timely, [barrier-free](#) access to their records as requested, in compliance with applicable legislation.
- **1.9.2** You facilitate the secure [transfer](#) of information in your patient's record.

Glossary of terms

Access	the ability to view and/or obtain copies of records.
Barrier-free	the removal of any obstacle that prevents or delays access to records
Custodian	an individual or organization responsible for maintaining records and protecting personal information in compliance with BC’s <i>Personal Information Protection Act</i>
Disclosure	the sharing of personal information with a third party
Informed Consent	the outcome of an ongoing dialogue between a provider and patient and/or authorized parties. The process ensures an understanding of the patient’s care allowing autonomous, well-considered decisions in the patient’s own interest. Consent must be given willingly and can be withdrawn at any time.
Interactions	any form of engagement between two or more parties. Interactions include relevant communications that may occur beyond the practice setting
Practice records	records including patient’s personal and health information, financial transactions, scheduling, drug inventory, equipment maintenance and sterilization logs
Privacy breach	unauthorized access to collection, use, disclosure, or disposal of personal information
Provider	a health professional involved in a patient's care
Transfer	delivery of patient information from a provider to patient or an authorized party

Resources

Documentation

- BCCOHP's [Standards for the Oral Health Team](#) (PDF)

Relevant legislation

Provincial Legislation	Federal Legislation
<ul style="list-style-type: none">• BC's Health Professions and Occupations Act• BC's Personal Information Protection Act• BC's Freedom of Information and Protection of Privacy Act• BC's Limitation Act• BC's Anti-Racism Data Act• The Grandmother Approach (BC Office of the Human Rights Commissioner)	<ul style="list-style-type: none">• Privacy Act• Access to Information Act• Personal Information Protection and Electronic Documents Act