

**College of Psychologists of British Columbia
Requirement to Designate a Professional Executor – Information Package**

PROFESSIONAL EXECUTOR DESIGNATION

The requirement to designate a professional executor has been in place since renewal of registration for the 2010 year. This information package provides basic information about the requirement to name a Professional Executor, and includes a decision-tree flow chart and FAQs regarding the Professional Executor Designation Requirement that provide answers to common questions regarding the requirements.

Designating an executor for your private practice and/or arranging for information access within your institution(s) is part of the requirement that you ensure, in the event of your incapacity or death, that you will meet your obligations under the *Code of Conduct* concerning continuity of care for clients. (See, for example, Standard 14.6 regarding contingency planning.) Your signed declaration will enable the College, in the event of your incapacity or death, to direct members of the public seeking your records to the appropriate registrant or institutional contact, and will facilitate access to and management of practice records.

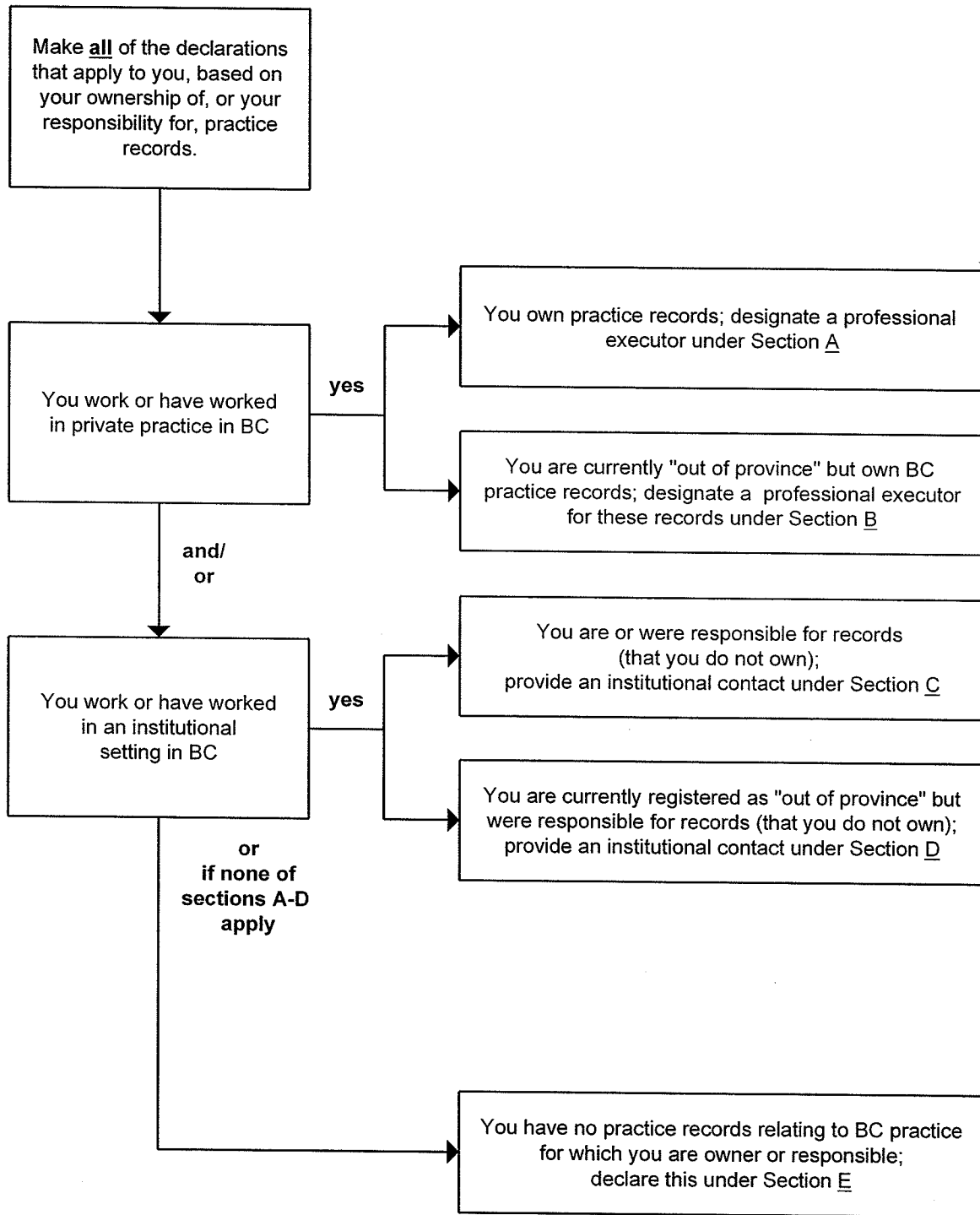
Registrants are obligated to name a registrant of the College as a Professional Executor if they own any practice records. Registrants are also obliged to provide contact information to enable access to records created by them but under the control of an institution (e.g.s, a health authority, a government ministry, a correctional centre, etc.). Each registrant is responsible for ensuring that the College is kept apprised of current information regarding his or her Professional Executor, and appropriate contact information for institutionally held practice records, as relevant. As examples, if your Professional Executor changes, or you begin creating practice records for which you do not have control in a new institutional setting, you are responsible for updating this information with the College.

If you are newly registered with the College in this calendar year, you are required to provide contact information as applicable for any institutional records created but not controlled by you. You may request a deferral to name a Professional Executor for private practice or other records under your control, but you must provide the College with the name of a registrant who has agreed to serve as your Professional Executor as soon as you have one, and in any event no later than one year after the date of your registration.

If after careful review of this information package you still have questions, you are invited to contact the College for assistance.

College of Psychologists of British Columbia
Professional Executor Designation Decision-Tree

What declarations should you make in your Declaration of Professional Executor Designation?



FREQUENTLY ASKED QUESTIONS

Q: I am currently in private practice, and I have practice records. Do I need to name a professional executor?

A: Yes. Make a declaration in Category A.

Q: I was in private practice, but I'm not anymore. I have practice records. Do I need to name a professional executor?

A: Yes. Make a declaration in Category A.

Q: I work mainly in Alberta, but I have one active client in Vancouver. For the client in Vancouver, I have a practice record. Do I need to name a professional executor in British Columbia?

A: Yes, you must name a professional executor in BC concerning practice records for work you are, or have been, providing in BC. You must name a professional executor for as long as you are maintaining practice records for work provided in BC. Make a declaration in Category A.

Q: I now practice entirely in Alberta, but I have practice records from when I practiced in BC. My registration status is "Out of Province". Do I need to name a professional executor in British Columbia?

A: Yes, you must name a professional executor in BC concerning practice records for work you provided in BC. You must name a professional executor for as long as you are maintaining practice records for work provided in BC. Make a declaration in Category B.

Q: I was formerly in private practice, but I now work exclusively in an institutional setting. I made this transition several years ago. I have practice records from when I was in private practice. Do I need to name a professional executor?

A: Yes, as long as you retain ownership of practice records concerning past private practice clients which you have an ongoing duty to maintain under the Code of Conduct. Make a declaration in Category A. You must also name an institutional contact under Category C.

Q: I do most of my work in an institutional setting, but keep one or two private patients. I have practice records relating to them. Do I need to name a professional executor?

A: Yes. You must name another registrant as a professional executor with respect to any and all practice records that you own. Make a declaration in Category A. You must also name a contact person at your institution responsible for institutional records. Make a declaration under Category C.

Q: I formerly worked in an institutional setting in BC, I am now registered in the “Out of Province” category and work entirely in Ontario. I do not have ownership of any BC practice records. Do I need to name a professional executor in British Columbia?

A: No, make a declaration under Category D.

Q: I work in a mental health centre. The mental health centre owns all of the records. Do I need to name a professional executor?

A: No, but you must name a contact person at your institution responsible for institutional records.

Q: Who in my institution should I name as a contact person? I work with a part-time psychologist, but there is also a manager.

A: An institutional contact person need not be another registrant of the College. You should name whoever has primary responsibility for the records within the institution.

Q: Can I name the position responsible for institutional records, or do I need to name a particular person?

A: You should always name a person, but also provide that person’s position. You are always free to update this information at your next renewal, or throughout the year.

Q: I have worked in an institution and it seems like the requirement to name a contact is indefinite. For how long will I have to name a contact?

A: If the institutional practice records are beyond the 7 year maintenance period (or longer in the case of working with persons under age 19), you may request an exemption from this requirement.

Q: Three years ago, I served as a practicum supervisor for a psychology training program. The practice records for the cases I supervised are owned and maintained by the university. Am I obligated to name someone in this case?

A: Yes. You should sign declaration Category C.

Q: Although I maintain my BC registration, I haven’t lived or worked in BC in many years. I don’t own or have responsibility for any BC practice records. Am I exempt from this requirement?

A: You may request an exemption by signing the declaration in Category E.