Planning for Retirement, Relocation, or Extended Absence from Practice Checklist

This document is intended to be of assistance to registrants with respect to their planning for retirement, relocation, or extended absence from practice. Relevant *Code* standards are indicated in brackets following the checklist items.

- ☐ I have notified clients of the expected date of my retirement, relocation, or extended absence well in advance to allow time for questions and concerns, and for processing reactions to the transition. I have set a specific date for termination, and have been consistent in my discussions with clients. **(3.29, 5.1, 5.17, 5.18, 5.19, 8.2, 14.6, 14.7)**

- ☐ I have planned a clinically appropriate termination for each current client and have made an assessment of each client's future needs and discussed my recommendations with them. I have made plans to transfer clients requiring continued care to another registrant or mental health professional. **(3.6, 5.1, 5.19, 5.26, 8.2)**

- ☐ [For registrants in private practice] I have offered clients who are to be transferred several referrals, and have obtained a release to forward a copy of the record or a summary of the record to the new clinician. **(3.6, 5.1, 5.19, 6.2, 8.2)**

- ☐ [For registrants in public or institutional practice] I have, if I was able to, provided several options to clients depending on the organizational structure, including introducing clients to the new clinician. I have determined whether I need to make arrangements to transfer records information. I have considered the option of preparing a letter to clients and selected former clients about my plans and have taken action in accordance with the clients' best interest. **(3.6, 5.1, 5.19, 6.2, 8.2)**

- ☐ I have prepared or updated instructions for my professional executor in the event of my death or incapacity. I have ensured that my executor has a copy of these instructions and will provide to them any updates I make to it. **(14.6, 14.7)**

- ☐ I have provided written information to current and selected former clients regarding how to access their records, and have specified that records will be destroyed once the required recordkeeping interval has elapsed. I have made arrangements for access to my records by providing to these clients an appropriate means by which to contact me or my professional executor (e.g., telephone number or mailing address). **(14.6, 14.7)**

- ☐ I have consulted with respected colleagues as appropriate during the transition period, regarding client welfare, transition process issues, or other matters. **(3.2)**

- ☐ [For registrants in private practice] I have informed relevant referral sources about my plans and provided alternate referral information as appropriate. **(3.2, 5.1)**

- ☐ [For registrants in private practice] I have ensured secure storage of my practice records, appointment books, financial records, and any test materials, including computerized testing materials, I plan to retain. **(14.1, 14.2, 14.3, 14.4)**

- ☐ [For registrants working in institutions where records are kept and managed by a central records office] I have reviewed the need to ensure that client test protocols and test materials are clearly marked for review only by a qualified professional and have taken action, if appropriate. **(14.8)**

- ☐

- ☐ I have made, and will retain and regularly update, a list of records that have been stored, and the date on which these should be destroyed. I will destroy outdated files, or have them destroyed by a confidential shredding company. I have reviewed computer-based records, and destroyed outdated files and outdated files on computers that will be out of my dominion and control. **(14.4)**

- ☐ I have ensured adequate professional insurance to cover time I am not practicing, including 'tail' insurance to cover liability after retirement. I understand that this coverage is important, as lawsuits or ethics complaints may be filed after I stop practicing, regarding services I provided while in active practice. **(3.8)**

- ☐ I have notified the College of Psychologists of B.C. in writing if I wish to apply to move into the Non-Practising class of registration (e.g., Non-Practising, Out-of-Province, or Retired) or if I wish to be taken off the register. I have consulted current policies regarding any status changes, as my ability to return to the active practice in the future, should my circumstances change, may be impacted by my decision. **(3.8)**