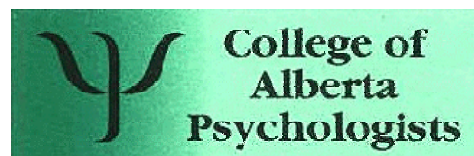


Professional Guidelines for Psychologists

SERVICE FEES
For the Provision of Copies
Of Client Files to
Authorized Persons

Adopted in 2000

Revised in 2005



COLLEGE OF ALBERTA PSYCHOLOGISTS
**SERVICE FEES FOR THE PROVISION OF COPIES
OF CLIENT FILES TO AUTHORIZED PERSONS**

The College of Alberta Psychologists Standards of Practice addresses the following issues related to professional fees:

- | | | |
|--------------------------------|-------|--|
| Disclosure of Cost of Services | 36(1) | Prior to providing professional services, psychologists must ensure that full information is provided to clients about financial arrangements, including fee structure, missed appointments and bill collection. Psychologists who bill clients directly shall issue to their clients an itemized statement, receipt, or account. |
| Retainer Fees | 36(2) | A psychologist may request and receive money as a retainer from, or on behalf of a client, to be used in whole or in part for payment of services yet to be provided. |
| | 36(3) | In cases where a psychologist has accepted money on retainer, a psychologist may only withdraw retainer funds for services as agreed upon and must issue a complete accounting of funds used at the termination of services. Interim accounting statements must also be issued at the request of the client. |
| | 36(4) | At the termination of the professional relationship between the psychologist and the client, or within twelve (12) months of the last date of the provision of professional services to or on behalf of the client, whichever date occurs first, the psychologist shall return to the client or the person who provided the retainer money any unused portion of the retainer money. |
| Acceptance of Commission | 37 | A psychologist shall not give a commission, rebate or remuneration to a person who has referred a client to the psychologist or accept a commission, rebate or remuneration from a person to whom the psychologist has referred a client. |

The CPA *Practice Guidelines for Providers of Psychological Services* is very clear on this topic:

III.3 Psychologists set reasonable fees for the services they render, inform the client of the fees that will apply to them, and collect fees in a manner which is considerate of the welfare of the client. Psychologists inform clients about fees and fee collection methods as early in a relationship as possible. (CE I. 17-18; II. 1; III. 10,23)

This of course, begs the question of what is reasonable. Evans, Mitchell, & Kazarian (1997) suggest that practitioners can determine the reasonableness of their fees by considering such factors as the time spent in rendering services, the complexity of the service, level of expertise of the psychologist, and established fee schedules.

This would appear to be an excellent starting point for considering what might be a reasonable fee for providing copies of material in a client file.

COLLEGE OF ALBERTA PSYCHOLOGISTS
**SERVICE FEES FOR THE PROVISION OF COPIES
OF CLIENT FILES TO AUTHORIZED PERSONS**

First, there is the factor of time. A psychologist should not charge a client for more time than a rendered service actually required. Similarly, a psychologist should not charge as their own for time spent by someone else in rendering a billable service. With respect to providing file copies, this implies that psychologists not charge for more than the amount of time taken to prepare the copy, nor charge as their own time the time that a clerical assistant may have spent preparing the file.

Second, there is the factor of complexity of the service. A psychologist's fee for professional services should reasonably reflect the complexity of the service rendered. For example, it would seem reasonable that a psychologist charge less for time spent waiting for a client to complete a questionnaire or a simple review of a file for photocopying than for interviewing a client or conducting psychotherapy. Of course from a purely economic stand-point, a psychologist should spend more time doing the highly complex tasks that only he or she is adequately trained for and can charge a higher fee for rendering and delegate simpler tasks to others wherever possible. It is not reasonable for psychologists, even if practicing alone without any assistants, to charge their full professional fees for time spent standing at a photocopier.

Third, there is the factor of expertise. Clearly a psychologist who has greater expertise or experience than the norm in some area of professional practice or who is viewed by the public as offering a higher level of service might adjust their fees accordingly. However, here again, it would seem unreasonable for a psychologist to charge more for photocopying or clerical tasks simply because they are a renowned expert in some specialized area of practice.

Fourth, there is the factor of established fee schedules. While it is true that Alberta psychologists are not bound to any particular fee schedule by law, the basic concept of "reasonable fees" should certainly reflect any fee guidelines agreed to by a majority of the profession as well as knowledge of the range of fees for service generally accepted by major third-party payers. In this regard, the Psychologists' Association of Alberta has established a suggested fee schedule for psychologists' services which is revised from time to time and publicized broadly. As well, various large and influential third-party payers such as government agencies, large healthcare organizations, and insurance providers commonly specify maximum amounts they will pay for various professional services.

Finally, as in any business, the private practice psychologist is in business to make a profit from his or her services. In order to do so, psychologists' fees for any service should take into account all actual costs of rendering service as well as a reasonable profit.

Based on the foregoing discussion, the Practice Advisory Committee offers the following guidelines for deterring reasonable fees for the service of providing a copy of all or part of a client file to the client or properly authorized third-party"

COLLEGE OF ALBERTA PSYCHOLOGISTS
**SERVICE FEES FOR THE PROVISION OF COPIES
OF CLIENT FILES TO AUTHORIZED PERSONS**

- The fee charged should reflect the actual amount of time involved in providing the required copy.
- The fee charged should reflect the actual complexity of the tasks involved in preparing and providing the required copy. Time spent by the psychologist in reviewing the file prior to its being copied would likely warrant a different fee than time spent in photocopying the file or addressing and posting it.
- Any fee relating to the psychologist's direct professional services (e.g., reviewing the file prior to copying and/or selecting required parts of the file, etc.) may reasonably reflect the individual expertise of the psychologist.
- Upon request, the client or other payer must be given an itemized invoice or accounting of the service rendered which, in the case of providing a copy of a client file, should at least give a breakdown of charges by professional time, clerical time, photocopying charges, and any charges for postage or courier services. These separate service fees may include within them an appropriate amount to cover general overhead costs and profit.

References

Canadian Psychological Association, *Practice Guidelines for Providers of Psychological Services*, Ottawa, ON: CPA.

Evans, D., Mitchell, B., & Kazarian, S. (1997). Business aspects of practice. In Evans (Ed.), *The law, standards of practice, and ethics in the practice of psychology*. Chapter 10. (pp. 259-283). Toronto: Emond Montgomery Publications.

CAP Standards of Practice (2005).