Reports, letters and legal requests

What CRPO asks when someone wants a report: consent and timing (Standard 5.2), fact and opinion, accurate documents (5.3), when you may refuse and when you may not, custody reports, and subpoenas.

Study aid, not legal advice. Last verified against the official sources linked below on 11 November 2026.

1 The duty (5.2.1)

- On request, provide a report or certificate about treatment **within a reasonable time**, unless there is reasonable cause not to: a letter, summary or form, not a copy of the record (that is 5.1).
- CRPO: respond in writing within **30 days** of the request.
- If a delay cannot be avoided, tell the requester why and give a **firm date**.

2 Before you write

- Get the client's (or their representative's) **express consent**, and verify anyone acting for them.
- Explain any **sensitive** content, and document whether the client wants to proceed.
- Include only what is relevant and requested; let the client **review it** before it goes.
- Send it **securely**.

3 What you write (5.2.2, 5.3.1)

- Say whether each part is **your opinion, objective fact**, or a summary of what the client told you.
- Stay within **your knowledge** and competence: no facts you do not know, no opinions outside your expertise.
- Anything you sign or send, or let others send for you, is **accurate and complete**, in clear language.
- Never sign or send a **misleading** or false document; invoices and receipts are accurate too.

4 You may refuse when

- You lack the **competence** for what is asked; you may still give facts such as treatment dates and presenting issues.
- You have no **consent** or legal authority to disclose.
- The report could cause **significant harm**, for example it is not in a child's best interests.

5 Never refuse because

- The client **cannot pay**, or there is a **dispute** with the client.
- You may charge a reasonable fee (for example pro-rated from your hourly fee), once the payer has an **estimate**.

6 Custody reports (CRPO manual)

- Have a **policy** on whether and for whom you write custody reports, and say so to everyone involved.
- Know **whose consent** releases whose information, including which parents consent for a child.
- Separate facts from interpretations; "**a good parent**" is an unclear opinion you cannot verify.

7 Lawyers, subpoenas, originals (CRPO manual)

- A lawyer for the other side asks for the record: acknowledge, tell your client and ask for the **client's consent**.
- The exception is a **summons, subpoena or court order**; if unsure, contact your clinical supervisor and legal counsel.
- Keep the original and send **copies**; where the law requires the original, keep a legible copy.

Consent first, within 30 days, fact apart from opinion, nothing you cannot stand behind; legal requests go to your lawyer.

Official sources: CRPO Standard 5.2, Requests for Reports and CRPO Standard 5.3, Issuing Accurate Documents and CRPO, Professional Practice and Jurisprudence manual. Condensed from Record-keeping and Documentation. Independent study aid, not legal advice, not affiliated with CRPO or COMPASS.