Practice Admin vs Clinician Privacy Boundary

A shareable guide for deciding what a practice should track, what a clinician owns, and how to keep CE compliance oversight from becoming unnecessary data collection.

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01 Practice admin may usually see

Keep visibility tied to compliance oversight.

- [ ] License status, renewal date, issuing board, and credential type.
- [ ] CE completion totals by category, including ethics and state-specific requirements.
- [ ] Documentation status: certificate on file, missing proof, or needs review.
- [ ] Reminder and follow-up status for open compliance tasks.

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02 Clinician should keep private or limited

Avoid collecting details that do not change a compliance decision.

- [ ] Board account credentials and passwords.
- [ ] Unrelated personal, health, HR, or disciplinary information.
- [ ] Personal learning notes, course preferences, and unrelated education history.
- [ ] Sensitive details beyond what oversight genuinely requires.

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03 Boundary rules

- [ ] Use one row per license, not one overstuffed row per person.
- [ ] Limit license numbers and sensitive fields to need-to-know users.
- [ ] Let clinicians see the compliance record the practice keeps about them.
- [ ] Delete or archive records according to a written retention policy.
- [ ] If a field does not change a compliance decision, consider leaving it out.