

## **AGENDA ITEM 11**

### **REVIEW AND APPROVE FEBRUARY 8-9, 2018, BOARD MEETING MINUTES.**

The meeting minutes are attached for review.



## BOARD MEETING MINUTES

**Thursday, February 8, 2018**

**Friday, February 9, 2018**

### Board Member(s) Present

Richard Bookwalter – President  
Sharon Pavlovich – Vice President  
Laura Hayth – Secretary  
Teresa Davies  
Jeff Ferro  
Denise Miller  
Beata Morcos

### Board Staff Present

Heather Martin, Executive Officer  
Jeff Hanson, Enforcement Manager  
Jody Quesada, Analyst  
Norine Marks, Legal Counsel

### **Thursday, February 8, 2018**

1. Call to order, roll call, establishment of a quorum.

The meeting was called to order at 9:37 a.m., roll was called, a quorum was established.

2. President's Remarks – Informational only; no Board Action to be taken.

President Richard Bookwalter thanked Kaiser San Leandro for use of their facility and acknowledged and thanked former Board President Denise Miller for her exemplary leadership.

3. Board Member Remarks – Informational only; no Board Action to be taken.

Denise Miller congratulated the new Board officers.

4. Public Comment session for items not on the agenda.

A letter from a member of the public regarding forming a professional corporation was reviewed and the Board members decided to add the topic to a future Board meeting.

There was no additional public comment.

5. Review and approve October 18-19, 2017, Board meeting minutes.

A technical non-substantive error was identified on page 4.

- Jeff Ferro moved to approve the minutes with amendments.
- Laura Hayth seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Aye

**President Bookwalter addressed agenda item 7 prior to item 6.**

6. Ad Hoc Committee on Fieldwork Report and Recommendation to Board of alternative approaches to increasing the availability of fieldwork sites in California for students completing academic requirements for licensure.

Committee Chair Sharon Pavlovich reported that it was the consensus of the Committee to explore the apprenticeship option and that more information was needed especially regarding funding.

Jeff Ferro stated that the Board could not be the vehicle that creates an apprenticeship program, employer and labor partners would need to take the lead.

Discussion ensued regarding funding and how to obtain it.

Teresa Davies commented that discussions were leaning more toward building a solution rather than exploration of alternatives and stated that wasn't the task assigned to the committee.

Public Comment

Ivan Altamura asked if the Board's regulations prevented apprenticeship.

Heather Martin stated there was no prohibition.

Cindy Garcia asked if the Committee considered partnering in the community as an alternative approach.

Sharon Pavlovich stated that community partnerships were a part of the conversation.

Discussion ensued regarding the actual number of shortages in fieldwork sites and that those numbers are currently gathered from the Employment Development Department (EDD) which in turn gets their data from employers which may not be the best collection method for accuracy.

An American Occupational Therapy Association (AOTA) representative reported that when AOTA was looking in to establishing a fellowship or residency they determined that a temporary license would need to be developed, the reimbursement process would have to be addressed and a plan to entice employers to participate would need to be devised. She reported that AOTA continues to research this issue.

7. Director's Report – *Dean Grafilo, Director, Department of Consumer Affairs and Christopher Castrillo, Deputy Director, Board and Bureau Services.*

Director Dean Grafilo introduced himself and stated that his first 11 months with the Department of Consumer Affairs has been positive and rewarding.

Director Grafilo and Deputy Director Christopher Castrillo reported holding a brown bag type Director's meeting that was attended by representatives from 30 programs, the department is holding meetings with Fi\$cal to share concerns, and spoke of the importance of the Future Leadership Development program in order to prepare for the future. Director Grafilo stated that it his intention and that of his team to be collaborative, forthright and transparent.

8. Presentation on legislative proposal sponsored by the American Occupational Therapy Association (AOTA), the Occupational Therapy Association (OTAC), and Capitol Advocacy, lobbyist for OTAC/AOTA, to amend the Occupational Therapy Practice Act and other sections relating to the practice of occupational therapy.

Ivan Altamura and Chrissy Vogeley thanked the Board for the opportunity to present proposed changes to legislative language and receive feedback.

Sharon Pavlovich asked if there was a reason that occupational therapy assistants (OTAs) were not included in the draft language and suggested the use of *occupational therapy practitioners* in the amendments would be more inclusive.

Ms. Pavlovich expressed her concern with the proposed removal of the word 'referred' in Section 2570.2(k) regarding Scope of Practice and the impact it may have to settings such as acute care hospitals and skilled nursing facilities.

Ms. Pavlovich suggested that language outlining the fact that educators are required to hold a California license to teach in California be added to the proposal.

Beata Morcos expressed a concern with proposed changes to Section 2570.3(d) that would allow a practitioner to self-attest that they have met the education and training required to provide advanced practice services as opposed to the existing requirement that a practitioner demonstrate to the satisfaction of the Board that they have met the requirements.

Ms. Davies stated that she was concerned that replacing advanced practice approval by the Board with a simple attestation would not be consistent with the Board's mandate to protect the public. Laura Hayth agreed.

The consensus of the Board was to oppose the implementation of an attestation for advanced practice approvals.

Public Comment

Cindy Garcia strongly advocated on behalf of OTAs that *occupational therapy practitioners* be used wherever feasible throughout the proposed language. Ms. Garcia also commented that occupational therapy is rooted in mental health and many fail to recognize mental health as a component.

Denise Miller questioned representatives from OTAC and AOTA about the responses they are receiving regarding the proposed language.

Mr. Altamura said OTAC and AOTA were getting good responses and that physical therapists had the biggest reaction surrounding the referral language due to the direct access issue.

9. Discussion of the amendments proposed in the AOTA/OTAC sponsored legislative proposal.

Regarding the addition of mental health language, Heather Martin suggested that OTAC reach out to the all the mental health disciplines for their opinion.

Teresa Davies recognized the need to update antiquated language but voiced her concern with fundamental changes to the scope of practice. Ms. Davies rhetorically asked how the proposed changes would benefit the consumer.

Richard Bookwalter stated he believed the OTAC/AOTA proposal to remove "referred" from Section 2570.2(k) does not represent a significant change to the existing language. Mr. Bookwalter reported the existing language does not specify a referral must come from a physician, and that referral as used in the section could pertain to many individuals, such a parent or the consumer themselves.

Public Comment

Chrissy Vogeley, AOTA stated that removing 'referred' removes barriers for consumers seeking occupational therapy services.

Ivan Altamura stated the discussion today has given him a sense of the pulse of the Board and that it is the goal of OTAC/AOTA to gain the support of the Board to proceed with legislative changes.

10. Discussion and possible action on bills of interest to the Board:
- a. Assembly Bill (AB) 387 (Thurmond), Minimum wage: health professionals: interns.
  - b. AB 703 (Flora), Professions and vocations: licenses: fee waivers
  - c. AB 827 (Rubio), Department of Consumer Affairs: "task force" foreign-trained professionals.
  - d. AB 835 (Dababneh), Consumer affairs: licenses: prohibited acts.
  - e. AB 1087 (Irwin), Teacher credentialing: services credential with a specialization in occupational therapy or physical therapy services.
  - f. AB 1510 (Dababneh), Athletic Trainers.
  - g. AB 1659 (Low), Healing arts boards: inactive licenses.
  - h. Senate Bill (SB) 27 (Morrell), Professions and vocations: licenses: military service.
  - i. SB 359 (Galgiani), Professions and vocations: military medical personnel.
  - j. SB 572 (Stone), Healing arts licensees: violations: grace period.

- k. SB 715 (Newman), Department of Consumer Affairs: regulatory boards: removal of board members.
- l. SB 762 (Hernandez), Healing arts licensee: license activation fee: waiver.
- m. SB 1217 (Stone), Healing arts: reporting requirements: professional liability resulting in death or personal injury.

Ms. Martin reviewed the included handout on the status of the legislative bills.

Public Comment

Ivan Altamura reported that AB 1087 was going to be reintroduced and would be an OTAC sponsored bill and AB 1510 was going to be introduced by Mullin as AB 3110.

- 11. Discussion and possible action on the Accreditation Council for Occupational Therapy Education's proposed amendments to the educational programs' accreditation standards. (Draft III Revisions – December 2017)

Mr. Bookwalter commented that he was pleased that not requiring students to 'demonstrate' competence was removed from the document and that the reference to 'maximum hours' for fieldwork had also been fixed.

Public Comment

There was no public comment.

- 12. Update on pending rulemaking file to add section 4149.5, Petition for Reinstatement or Modification of Penalty, to California Code of Regulations (CCR), Title 16, Division 39.

Ms. Martin explained that although the Board had previously approved this language she filed a motion to withdraw the proposed language on behalf of the Board at the request of (control agency) Business, Consumer Services, and Housing Agency since Office of Administrative Law met with staff and indicated they were going to disprove this language. Although there was an opportunity to correct the language, the withdrawal was submitted given the sensitivity of the issue and the priority of the Administration regarding removing barriers to licensure.

Board members expressed their displeasure that the will of the Board was not carried out. Ms. Martin indicated that a possible solution was provided under agenda item 13.

Public Comment

There was no public comment.

- 13. Consideration and possible approval of proposed addition to Title 16, CCR Division 39, regarding petitions for reinstatement of licenses or modification of penalty.

Ms. Martin explained that the regulations were intended to implement and make specific B&P code section 2570.32 which states the Board 'may refuse to consider a petition' under reasons as specified. The Office of the Attorney General has said that, among other things, the use of "may" is not transparent enough for the applicant. Discussion ensued regarding the difference between the 'shall refuse' and 'may refuse' to consider a petition.

Legal Counsel Norine Marks stated that concerns were specifically expressed with the Board exclusively choosing to not 'consider' specific kinds of cases.

A couple of different versions of proposed regulatory amendments were provided for the Board's consideration.

- Laura Hayth moved to approve version three of the language for noticing.
- Beata Morcos seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Aye

- Sharon Pavlovich moved to allow the Executive Officer to make technical, non-substantive changes.
- Teresa Davies seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Aye

14. Consideration and possible approval of proposed amendments to Title 16, CCR Division 39, Section 4101, Delegation of Certain Functions.

Heather Martin explained that amended language proposed to section 4101 would delegate authority to the Executive Officer to vacate default decisions upon a motion or petition received from a licensee before the default decision (revocation) becomes effective. The proposed amendment would not extend the Executive Officer delegated authority to vacate a default decision in the event a Writ of Mandate in Superior Court after a default decision becomes effective.

Ms. Martin reported the proposed amendment would streamline administrative processes related to these matters, and hopefully translate to the licensee being set for a hearing sooner to promote public protection. Further the proposed amendment limits the

Executive Officer's delegated authority to only granting a motion or petition in these matters. The decision to deny a motion or petition filed by a licensee to vacate a default decision is maintained by the Board.

Ms. Martin reported that one recent Writ of Mandate that was recently filed against the Board requesting that a default decision be vacated to allow the licensee the opportunity to have a hearing could have been avoided if this proposed amendment had been adopted and in effect.

Teresa Davies and Denise Miller opposed the proposed changes, preferring that motions and petitions to vacate a default decision come before the Board for a vote.

- Sharon Pavlovich moved to accept the language for noticing.
- Jeff Ferro seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	No
Jeff Ferro	Aye
Denise Miller	No
Beata Morcos	Aye
Sharon Pavlovich	Aye

- Jeff Ferro moved to allow the Executive Officer to make technical, non-substantive changes.
- Beata Morcos seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	No
Jeff Ferro	Aye
Denise Miller	No
Beata Morcos	Aye
Sharon Pavlovich	Aye

15. Consideration and possible approval of proposed amendments to Title 16, CCR Division 39, Section 4146, Definitions.

Heather Martin informed the Board that staff has noticed an uptick in the number of domestic violence cases received and that the proposed changes address this type of case.



Following discussion amongst the Board members regarding the proposed changes and current Board operation regarding receipt of arrests, Beata Morcos clarified that approving this language would better serve the consumer by enabling Board staff to act on the arrest that is received within days rather than waiting for a conviction which could be many months or longer.

Ms. Martin confirmed Ms. Morcos' statement.

Board members asked to update section (d)(4) by replacing 'violating' with 'violation of.'

Public Comment

Ivan Altamura offered that temporary restraining orders are often issued with no adjudication of facts.

Cindy Garcia stated that restraining orders can be falsely obtained and that every case should be assessed on a case by case basis.

- Beata Morcos moved to approve language as amended for noticing.
- Laura Hayth seconded the motion.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	No
Jeff Ferro	Aye
Denise Miller	No
Beata Morcos	Aye
Sharon Pavlovich	Aye

- Laura Hayth moved to allow the Executive Officer to make technical, non-substantive changes.
- Sharon Pavlovich seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	No
Jeff Ferro	Aye
Denise Miller	No
Beata Morcos	Aye
Sharon Pavlovich	Aye

**CONVENE CLOSED SESSION**

The Board will meet in closed session pursuant to Government Code Section 11126(c)(3) to deliberate and vote on disciplinary matters.

The Board entered in to closed session at 3:36 pm.

## RECONVENE IN OPEN SESSION

The Board convened in open session at 4:42 pm.

16. Recess for the day.

The meeting adjourned at 4:42 pm.

### Friday, February 9, 2018

17. Call to order, roll call, establishment of a quorum.

The meeting was called to order at 9:37 a.m., roll was called, Teresa Davies was absent. A quorum was established.

18. Public Comment session for items not on the agenda.

*Please note: The Board may not discuss or take action on any matter raised during this public comment section, except to decide whether to place the matter on the agenda of a future meeting [Government Code Sections 11125 and 11125.7(a)]*

Lindy Joffe identified herself as the practitioner who wrote the letter regarding wanting a certificate of registration from the Board in order for her to form a 'professional corporation' (as provided in the Moscone-Knox Professional Corporation Act).

Richard Bookwalter explained to Ms. Joffe that the Board members were aware of her concerns as the letter was discussed during the previous day's public comment session. Mr. Bookwalter welcomed any additional comments that Ms. Joffe wanted to add and informed her that the Board agreed to add her topic to the May Board meeting but would not be able to take any action at this meeting.

Ms. Joffe stated that it was a requirement that she get a certificate of registration from the licensing board to be recognized as a corporation and that her goal was to achieve being recognized as a corporation lawfully. Ms. Joffe stated that her attorney told her that the licensing board could write the certificate of registration without changing legislation.

Mr. Bookwalter questioned Ms. Joffe's use of "licensing board" and "OTAC" interchangeably throughout her letter. Ms. Joffe confirmed that she meant to reference the licensing board only.

Ms. Joffe stated that she would forward any additional information that her attorney may have to Board staff to have it included in the next Board meeting.

#### Public Comment

There was no additional public comment.

19. Discussion and consideration of new board logo.

The Board members discussed their opinions and ultimately asked Heather Martin to make a few updates and bring the results back to the Board for review.

Public Comment

There was no public comment.

20. Discussion and consideration of Administrative Committee's recommendations on proposed edits to the Board's Administrative Manual.

President Richard Bookwalter reported that he met with Vice President Sharon Pavlovich and Executive Officer Heather Martin to review and update the Board's Administrative Manual.

Discussion ensued regarding the proposed edits and Board members offered suggestions and edits of their own.

*Sharon Pavlovich departed at 11:15 am. A quorum was still in place.*

Mr. Bookwalter asked that Board staff make the agreed upon edits and bring the updated Administrative Manual to a future Board meeting for review.

Public Comment

There was no public comment.

21. Discussion on updating the Board's Disciplinary Guidelines.

Mr. Bookwalter reported that the Board's Disciplinary Guidelines hadn't been changed in approximately 5 years. Mr. Bookwalter stated that any changes to the Disciplinary Guidelines there would be an approximate timeframe of nearly two years to change the corresponding regulations.

Mr. Bookwalter asked the Board members how they wanted to proceed with the review of the Disciplinary Guidelines.

Discussion ensued regarding forming an Ad Hoc committee to review the Guidelines or assignment of the Administrative committee for review.

Legal Counsel Norine Marks cautioned the Board that the review is a painstaking process.

- Jeff Ferro moved to appoint the Administrative committee to review the Board's Disciplinary Guidelines.
- Laura Hayth seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Absent
Jeff Ferro	Aye
Denise Miller	Aye

Beata Morcos  
Sharon Pavlovich

Aye  
Absent

22. Discussion on updating the Board's Disciplinary Resource Manual.

Mr. Bookwalter asked Ms. Martin if there was value in making changes to the Disciplinary Resource Manual along with the Disciplinary Guidelines.

Ms. Martin explained that the reviews should be independent because changes to the Disciplinary Guidelines require regulation updates that could take two years or more.

Mr. Bookwalter asked the Board members to review the Resource Manual and bring any concerns to the next Board meeting.

Public Comment

There was no public comment.

23. Update and possible action on the Board's Strategic Plan Action Plan.

Ms. Martin reviewed the included Strategic Plan Action Plan handout.

Public Comment

There was no public comment.

24. Licensing and enforcement data for the quarter ending December 31, 2017.

Ms. Martin reviewed the included enforcement data handouts.

Public Comment

There was no public comment.

25. Executive Officer's Report.

a. Operational Report.

Ms. Martin reported that Fi\$cal is the new consolidated budgeting, accounting, procurement, and cash management system that became operational July 1, 2017, and the revenue/expenditure information isn't yet available.

Ms. Martin informed Board members that Board staff would be sending emails regarding training to be completed, Board staff is looking for new office space and the number of Facebook and Twitter followers had increased.

b. Signed legislation.

Ms. Martin stated that a legislation update will be reviewed at the next meeting.

c. Future Agenda Items.

Ms. Martin said that in addition to the items listed in her report, the following items were identified as future agenda items:

- Mail ballot policy

- Little Hoover Commission report on licensure.
- Board Logo
- Board Administrative Manual with updates.
- Board Resource Manual.

d. Other Informational Items.

Ms. Martin reviewed the other Informational Items that she provided handouts for as information on Regulatory Amendments, Report from the Office of Attorney General and Little Hoover Commission Report.

Mr. Bookwalter asked the Board members to review the discipline section of the Little Hoover report and it could be discussed at a future Board meeting.

Denise Miller stated that she was not in support of several findings in the Little Hoover Commission report.

26. Suggested agenda items for a future meeting.

This topic was addressed under the Executive Officer's report.

Adjournment.

The meeting adjourned at 12:57 pm.

## **AGENDA ITEM 12**

### **REVIEW AND APPROVE APRIL 11, 2018, TELECONFERENCE BOARD MEETING MINUTES.**

The meeting minutes are attached for review.



## TELECONFERENCE BOARD MEETING MINUTES

**Wednesday, April 11, 2018**

### Board Member(s) Present

Richard Bookwalter – President  
Sharon Pavlovich – Vice President  
Laura Hayth – Secretary  
Teresa Davies  
Jeff Ferro  
Denise Miller  
Beata Morcos

### Board Staff Present

Heather Martin, Executive Officer  
Jeff Hanson, Enforcement Manager  
Jody Quesada, Analyst  
Norine Marks, Legal Counsel  
Reza Pejuhesh, Legal Counsel

### **3:00 pm – Board Meeting**

1. Call to order, roll call, establishment of a quorum, and introduction of Board members.

The meeting was called to order at 3:02 p.m., roll was called, a quorum was established.

Reza Pejuhesh introduced himself as the Board's newly appointed legal counsel.

President Richard Bookwalter asked Executive Officer Heather Martin to add an agenda item to the next Board meeting pertaining to permissible communications among Board members.

Mr. Bookwalter stated that the purpose of the meeting was for the Board to review the Legislative and Regulatory Affairs committee's recommendations regarding bills that affect the Board. Mr. Bookwalter informed the Board that he was the chair of the committee and that the members of committee included were Luella Grangaard, Christine Wietlisbach and Ada Boone Hoerl.

2. Public Comment session for items not on the agenda.

The Committee may not discuss or take any action on any matter raised during this public comment section, except to decide whether to place the matter on the agenda of a future meeting. (Government Code Sections 11125 and 11125.7(a))

There was no public comment.

3. Discussion and consideration of Legislative and Regulatory Affairs Committee's recommended position(s) to the Board on the following bills:

a) Assembly Bill (AB) 2078 (Daly), Sex offenses: professional services.

- Denise Miller moved to accept the committee's recommendation of supporting the bill.
- Laura Hayth seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Aye

- Jeff Ferro moved to direct the Executive Officer to draft a letter of support to the bill's author.
- Denise Miller seconded the motion.

Public Comment

There was no public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Aye

b) AB 2138 (Chiu and Low), Licensing boards: denial of application: criminal conviction.

President Bookwalter took an initial pulse of the Board Members' position on AB 2138.

Secretary Laura Hayth stated her opposition until the time the Board could discuss it in person.

Vice President Sharon Pavlovich stated her opposition. Ms. Pavlovich said that there were a lot of amendments needed and encouraged her fellow Board members to take a position because she felt like not taking a position would be viewed as a neutral stance.

Teresa Davies stated that her initial thought was to oppose because she felt that it diminished consumer protection but opted to wait and see the position of other healthcare boards and bureaus.

Denise Miller stated that she needed more time to review the whole situation and wished to wait for other Boards and Bureaus to weigh in.

Beata Morcos stated her opposition because she felt that it did not protect the consumer and she encouraged her fellow Board members to take a position without waiting for the input of any other Board or Bureau.



Jeff Ferro said he was interested to see what the Assembly Business and Professions committee would say in the upcoming week.

Mr. Bookwalter agreed with Mr. Ferro.

- Laura Hayth moved to oppose the bill as written and direct Board staff to draft a letter of opposition to the bill's author.
- Beata Morcos seconded the motion.

Public Comment

Ivan Altamura offered a review of legislative timelines and the fact that the present time is not the last chance for the Board to comment.

Legal Counsel Norine Marks commented that if she was the author of the bill, she would want to know early on if there were concerns or opposition.

**Roll Call Vote**

Richard Bookwalter	No
Laura Hayth	Aye
Teresa Davies	No
Jeff Ferro	No
Denise Miller	No
Beata Morcos	Aye
Sharon Pavlovich	Aye

**The motion failed for lack of majority.**

c) AB 2221 (Bloom), Occupational Therapy Practice Act.

Mr. Bookwalter gave an overview of the Committee's concerns outlined in the provided highlights.

Ms. Pavlovich left the meeting at 4:11 p.m.

Public Comment

Ivan Altamura on behalf of the Occupational Therapy Association of California (OTAC) and the American Occupational Therapy Association (AOTA) stated his appreciation for the committee's comments and feedback.

Ms. Miller inquired about OTAC's and AOTA's timeline for this bill.

Mr. Altamura stated that the next step is to sit with the author and address the concerns and comments of the Board.

Ms. Miller expressed that she wished to discuss the bill at the next in-person Board meeting but felt it important to submit comments since the bill was moving forward.

The Board further discussed scope of practice, the proposed advanced practice attestation, the removal of the language related to doctoral degrees and the required licensure of educators.

Mr. Bookwalter stated that he was not in favor of an attestation process for advanced practice approval.

Mr. Altamura commented that use of the attestation was intended to give the Board oversight through the audit process.

- Denise Miller moved to accept the Committee's recommendations and oppose the bill unless amended.
- Teresa Davies seconded the motion.

**Public Comment**

Ivan Altamura expressed his hope that the Board would take a position of "support if amended".

Ms. Miller expressed her disappointment in the fact that the bill was moving forward and the amendments OTAC was proposing was not brought to the meeting for their review; thus, it would not be possible for her to support the bill without having all the information.

**Roll Call Vote**

Richard Bookwalter	No
Laura Hayth	No
Teresa Davies	Aye
Jeff Ferro	No
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Absent

**The motion failed for lack of majority.**

- Laura Hayth moved to accept the committee's recommendations and support if the bill is amended.
- Jeff Ferro seconded the motion.

**Public Comment**

No public comment.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	No
Jeff Ferro	Aye
Denise Miller	No
Beata Morcos	No
Sharon Pavlovich	Absent

**The motion failed for lack of majority.**

The Board requested

d) AB 3110 (Mullen), Athletic trainers.

Following the review of the committee's recommendation Ms. Davies and Ms. Miller expressed a need for clarification of the specific concerns of the committee and their need for a recommendation from the committee.

Mr. Ferro and Ms. Hayth agreed with Ms. Davies and Ms. Miller.

- Jeff Ferro moved to send the bill back to the committee for clarification of concerns with specific recommendations.
- Laura Hayth seconded the motion.

Public Comment

Lora Woo asked if the Athletic Trainers sent in a clear rationale as to why they have chosen the Occupational Therapy Board.

Mr. Chisar stated that there is a synergy between the athletic trainer profession and the occupational therapy profession that would result in a great opportunity to collaborate. Mr. Chisar also stated that being under an existing Board keeps in line with the Governor's plan of not implementing additional government oversight.

Ivan Altamura commented that the Athletic Trainers should have their own board or fall under the Medical Board because Athletic Trainers must be supervised by a physician. Mr. Altamura suggested that the Athletic Trainers seek title protection first.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Absent

4. Discussion and consideration of taking a position on AB 2386 (Rubio), Teacher credentialing: services credential with a specialization in occupational therapy or physical therapy services.

- Teresa Davies moved to send the bill back to the Legislative/Regulatory committee to provide specific edits and a recommendation.
- Jeff Ferro seconded the motion.

Public Comment

Ivan Altamura offered that the bill was amended to direct the Commission on Teacher Credentialing to convene a work group for a recommendation to the legislature of what it would look like to establish a credential for occupational therapists and physical therapists employed by school districts.

**Roll Call Vote**

Richard Bookwalter	Aye
Laura Hayth	Aye
Teresa Davies	Aye
Jeff Ferro	Aye
Denise Miller	Aye
Beata Morcos	Aye
Sharon Pavlovich	Absent

5. Legislative Items for Future Meeting. The Board may discuss other items of legislation in sufficient detail to determine whether such items should be on a future board meeting agenda and/or whether to hold a Special Meeting of the Board to discuss such Items pursuant to Government Code Section 11125.4.

There were no additional legislative items discussed.

6. Adjournment

The meeting adjourned at 5:42 p.m.

## **AGENDA ITEM 13**

### **REVIEW AND APPROVE MAY 16, 2018, TELECONFERENCE BOARD MEETING MINUTES.**

The meeting minutes are attached for review.



BUSINESS, CONSUMER SERVICES, AND TRADING AGENCY • GOVERNOR EDWIN S. BRIDGES, JR.

**CALIFORNIA BOARD OF OCCUPATIONAL THERAPY**

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**TELECONFERENCE BOARD MEETING MINUTES**

**Wednesday, May 16, 2018**

The Teleconference Board Meeting was cancelled due to a Board member not being at a noticed location as required by the Bagley-Keene Open Meeting Act.

## **AGENDA ITEM 14**

### **AD HOC COMMITTEE MEETING REPORT.**

The May 8<sup>th</sup> committee meeting materials are attached for review.



**CALIFORNIA BOARD OF OCCUPATIONAL THERAPY**

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**TELECONFERENCE AD HOC COMMITTEE  
MEETING NOTICE AND AGENDA**

**Tuesday, May 8, 2018**

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Building 34, Room 250  
8800 Grossmont College Drive  
El Cajon, CA 92020  
(619) 644-7307

**2:00 pm – Ad Hoc Committee on Fieldwork Meeting**

Public comments will be taken on agenda items at the time the item is heard and prior to the Ad Hoc Committee taking any action on said items. Agenda items may be taken out of order and total time allocated for public comment on particular issues may be limited at the discretion of the Committee Chairperson. A quorum of the Board may be present at this meeting. Board members who are not members of the Committee, however, may observe, but may not participate or vote.

1. Call to order, roll call and establishment of a quorum.
2. Introduction of Committee members.
3. Public Comment session for items not on the agenda.  
The Committee may not discuss or take action on any matter raised during this public comment section, except to decide whether to place the matter on the agenda of a future meeting. (Government Code Sections 11125 and 11125.7(a))
4. Review and approval of the January 23, 2018, Ad Hoc Committee on Fieldwork meeting minutes.
5. Discussion and exploration of alternative approaches to increasing the availability of fieldwork sites in California for students completing academic requirements for licensure (Business and Professions Code section 2570.6). Consideration of possible recommendations to the Board.



6. Suggestions for future agenda items.
7. Adjournment.

Public comments will be taken on agenda items at the time the item is heard. Discussion and action may be taken on any item listed on the agenda. Agenda items may be taken out of order for convenience, to accommodate speakers, or to maintain a quorum.

In the event a quorum of the committee is unable to attend the meeting, or the committee is unable to maintain a quorum once the meeting is called to order, the chair of the meeting may, at his or her discretion, continue to discuss items from the agenda and to vote to make recommendations to the full board at a future meeting.

Meetings of the California Board of Occupational Therapy and its committees are open to the public except when specifically noticed otherwise in accordance with the Open Meeting Act.

An opportunity for public comment is provided for each open agenda item. For further information on this meeting and agenda, contact Jody Quesada at (916) 263-2294 or submit a written request to her at 2005 Evergreen Street, Suite 2250, Sacramento, California, 95815.

The meeting, including all teleconference locations, is accessible to the physically disabled. A person who needs disability related accommodations or modifications in order to participate in the meeting shall make a request to Jody Quesada at (916) 263-2294 or by mailing a written request to 2005 Evergreen Street, Suite 2250, Sacramento, California, 95815.

Providing at least five working days' notice before the meeting will help ensure the availability of accommodations or modifications. This agenda can be found at the Board's website at: [www.bot.ca.gov](http://www.bot.ca.gov).



## ***Funds to help California employers with their training needs***

### **What is ETP?**

The Employment Training Panel (ETP) is a state agency that assists California employers by providing funds to off-set the costs of job skills training. The program serves as the state's premier economic development tool, encouraging many companies to locate or expand in California with the assistance of ETP's job training funds.

With \$100 million annually in funds, ETP provides funding reimbursement to employers throughout California. ETP allocates the funds to:

- Single Employer contracts - \$45 million
- Multiple Employer contracts (coordinated by associations) - \$25 million
- Apprenticeship contracts - \$17 million (traditional & non-traditional sectors)
- Governor's Critical Proposal contracts - \$7 million
- Small Business contracts - \$6 million

### **How can ETP benefit my company?**

Our staff can help you develop and fund a training program that meets your specific needs. ETP funded training may be delivered by any combination of internal or external training providers. Reimbursement amounts are based upon the amount of training delivered, averaging approximately \$1,500 to \$2,700 per trainee. ETP-funded training is tracked using a web-based tracking program that streamlines administration and invoicing processes. ***ETP's annual funding means that it is an on-going source of financial support.***

Courses eligible for ETP include: Advanced Technology, Business Skills, Commercial Skills, Communication Skills, Computer Skills, Continuous Improvement, Management Skills, Manufacturing Skills, and Literacy Skills.

### **Who can contract with ETP?**

ETP can contract directly with any one of the following entities:

- Private-for-profit employers and certain non-profit employers;
- Chambers of Commerce, Trade Associations, Joint Apprenticeship Training Committees, and Economic Development Corporations;
- Public and Private Training Institutions;
- Workforce Development Boards and Workforce Innovation and Opportunities Act funded organizations.

For information, please call our Economic Development Unit or email us: [etpedunit@etp.ca.gov](mailto:etpedunit@etp.ca.gov). You may also sign-up for one of our interactive orientations at: [www.etp.ca.gov](http://www.etp.ca.gov)

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San Francisco Bay Area - 916-327-5258  
Greater Los Angeles - 818-755-1309

Northern California/Central Valley - 916-327-5262  
San Diego/Inland Empire Region - 619-881-2407



## ***Focus on Healthcare and Medical Skills Training***

ETP has a proven track record serving healthcare providers in California and prioritizes training for the career advancement and job security of frontline workers in nursing and allied healthcare occupations.

During the 2015/2016 Fiscal Year, ETP approved over \$9.6 million in contract program funds for the training of 5,538 nurses and 3,124 workers for positions in healthcare related fields including medical office administrators, medical billing technicians, lab technicians and medical assistants.

Medical Skills training eligible for reimbursement includes Didactic (Classroom) and Preceptor (Clinical) Training. Both are reimbursed at \$22 per trainee, per training hour. For medical skills training, the training may consist of 100% Preceptor.

ETP also funds training for healthcare industry occupations that is outside didactic or clinical training topics, such as Continuous Improvement and Computer Skills. Training delivery may be in a classroom or simulated laboratory, or by Computer Based Training (CBT).

Companies across the healthcare sector have sought support from ETP to innovate and increase skill levels across their entire organizations, including:

Riverside Healthcare System, LP dba Riverside  
Community Hospital

Temecula Valley Hospital, Inc.

Home Health Care Management, Inc.

Los Alamitos Medical Center Inc., dba  
Los Alamitos Medical Center - A CA Corp

CHA Hollywood Medical Center LP dba  
Hollywood Presbyterian Medical Center

Fresno Surgery Center, L.P.

Southern CA Healthcare System Inc.,  
dba Southern CA Hospital at Culver City

Southern California Permanente Medical Group

BHC Alhambra Hospital, Inc.

AHMC Garfield Medical Center LP dba Garfield  
Medical Center

ETP also funded several organizations that directly support healthcare companies including: Jewish Vocational Service of Los Angeles, California Workforce Association, Tulare Adult School and many of California's Community Colleges and Universities.

*"We are very pleased to participate in this program to further enhance our nurse training programs to meet the needs of our growing hospital and the community we serve."*

~ Amber Gollogly, Temecula Valley Hospital

## Apprenticeship Training Pilot Program

Apprenticeship GLOSSARY

Apprenticeships are a multi-year training program that results in DAS certification to work as a journeyman. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. (Labor Code Sections 3070 *et seq.*) Apprentices commit to training under contract with a program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid during hours on the job in progression with levels of advancement. Apprenticeships are traditional in the building trades, but are available in many other occupations.

**CAC:** California Apprenticeship Council. The CAC sets apprenticeship policy and establishes standards for apprenticeship programs. (Title 22, California Code of Regulations Section 212.) The CAS is staffed by DAS.

**CBA:** Collective Bargaining Agreement. The CBA sets forth the terms and conditions of apprenticeship as negotiated between a union and signatory employer(s). It shows the amount of employer payments into the training trust, based on hours worked by apprentices and journeymen. It also shows the percentage of journeyman wages paid for on-the-job training. Apprentices may receive health and pension benefits in addition to wages, under the CBA.

**DAS:** Division of Apprenticeship Standards within the Department of Industrial Relations. DAS must review and approve all apprenticeship programs including RSI curriculum.

**Excess Costs:** The amount of funding needed to pay for RSI, in addition to Montoya Funds. If RSI is delivered by the LEA the program sponsor must reimburse excess costs. If delivered "off campus" by the program sponsor, the LEA forwards Montoya Funds to the sponsor, minus its own administrative costs. (Labor Code Section 3074.)

**JATC:** Joint Apprenticeship Training Committee (or Council). The JATC is formed as a trust, as an outgrowth of collective bargaining. It acts as a board of trustees, administering the apprenticeship training funds. Both the union and signatory employer(s) appoint an equal number of trustees, to administer jointly. The trust may also be used to fund training for pre-apprentices and journeymen.

**LEA:** Local Educational Agency. This may be a high school district, or Regional Occupational Center/Program operated by the district under oversight by the California Department of Education (CDE). It may also be a community college operated by the California Community College Chancellor's Office (CCCCO). LEAs are formed for the purpose of delivering adult education including RSI.

**MITC:** Minimum Industry Training Criteria. These criteria are set by the CAC and are updated every three years to recognize new materials and techniques. (Title 2, CCR Section 212.01.)

**Montoya Funds:** State of California funding for RSI appropriated each year to CDE and CCCCCO under the Budget Act. They are called Montoya in recognition of former State Senator Joseph Montoya, who promoted the concept. They are allocated to LEAs based on RSI attendance by both CAC and CCCCCO.

**On-the-Job Training:** The bulk of apprentice training time is on-the-job, under the direction of an experienced journeyman. Wages are paid during on-the-job training, as a percentage of journeymen wages, with oversight by CAC. (Title 22, California Code of Regulations Section 208.)

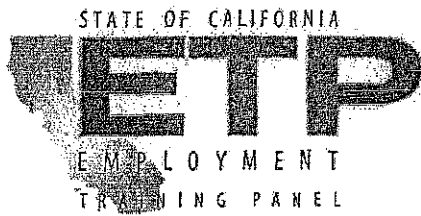
**Plant Standard:** Apprenticeship program sponsored by a single employer.

**Program Sponsor:** The trust fund that sponsors an apprenticeship program for a trade or other occupation. The program sponsor develops apprenticeship training curriculum and other standards in accordance with the Labor Code and CAC regulations. The RSI curriculum must be developed with an LEA affiliate. The full standards must be reviewed and approved by and registered with DAS.

**RSI:** Related and Supplemental Instruction. This is the component of apprenticeship training that is delivered in a classroom or simulated laboratory. Typically, RSI is 144 hours per year although DAS will accept variations depending on the overall program standards. The probation period for RSI is capped at 72 hours. (Labor Code Section 3078.) Apprentices take RSI in the evenings or on weekends, allowing for time to complete on-the-job training.

**UAC:** Unilateral Apprenticeship Committee. Like a JATC, it is formed as a trust, but it is not an outgrowth of collective bargaining. It is formed by a group of employers such as Western Electrical Contractors Association. There are no union appointments to the board of trustees. As with a JATC, the trust may be used to fund training for pre-apprentices and journeymen.

This glossary includes terms not used in the Apprenticeship Training Pilot Program Guidelines, by way of background.



# APPRENTICESHIP TRAINING

## Pilot Summary

On March 23, 2012, the Panel approved Guidelines for an Apprenticeship Training Pilot Program. **See Apprenticeship Glossary.** Unless modified by these guidelines, all other program criteria apply.

### **Contract Structure**

- Typically, apprenticeship training will be funded through a Joint Apprenticeship Training Committee (JATC) or an “umbrella” organization with JATC membership. It may also be funded through a Unilateral Apprenticeship Committee (UAC), or by a Single Employer.
- Typically, the JATC or UAC is also the program sponsor. An “umbrella trust” is also recognized as a sponsor. The sponsor must be approved by, and the program must be registered with, the Division of Apprenticeship Standards (DAS).
- Each apprenticeship program must have a separate Job Number. Pre-Apprentice and Journeyman training must also be separated by Job Numbers.

### **Trainee Eligibility**

- Apprentices will be considered to be Retraitees for eligibility purposes. Pre-Apprentices may be considered to be either New Hire or Retraitees for eligibility.
- Apprentices, Pre-Apprentices and Journeymen are not eligible for enrollment in a sequential contract until they have completed retention in the active contract.
- Apprentice trainees must have completed their probation period or have advanced to Year 2+ in the apprenticeship program. An exception may be made for trainees who have completed Pre-Apprentice training, to be determined case-by-case. A similar exception may also be made for trainees who have advanced to Year 1, Period 2 when the apprenticeship program is less than or equal to 24 months.
- ETP will use occupational titles as registered with DAS.
- Pre-Apprentices and Journeymen are also eligible under the pilot.
- Journeymen do not need DAS certification as a condition of eligibility

### **Reimbursement**

- The Panel may adopt “funding caps” per Fiscal Year. Each apprenticeship job number may be capped in addition to the MEC overall. **See Funding Table.**
- Apprenticeship training is reimbursed as Class/Lab with a special rate of \$13 per hour (Priority Industry Rate of \$18 minus \$5 Montoya). There is no Computer Based Training (CBT) rate for Apprentices.
- Pre-Apprentice and Journeyman training is reimbursed as Class/Lab with a blended rate of \$22 per hour. CBT is also allowed at \$8 per hour.
- The Apprenticeship Pilot will not be funded as Special Employment Training (SET), although the SET statewide wage will be used for all trainees as a matter of administrative convenience.

**Wage Requirement**

- When the program sponsor is a JATC, union-negotiated wages will be accepted.
- The High Unemployment Area (HUA) wage modification will not apply to this Pilot.

**Retention Requirement**

- Retention may be 500 hours within 272 days with multiple employers, rather than 90 consecutive days with a single employer. This applies to all trainees under the Apprenticeship Pilot.
- The contractor may apply for funding under this Pilot in a subsequent Fiscal Year for all trainees. The same cap on hours applies each year. Trainees may be enrolled in a sequential contract, but only after retention is completed under the first contract.
- The apprenticeship program's "retention rate" will be made part of the funding proposal. This is the rate of graduation from the program (on file with DAS).
- If the apprenticeship program's average retention rate is below 50% of the industry average, then an explanation and justification for funding will be required.

**Hours of Training**

- Apprentice training hours are 8 and 200. An approved justification is required to exceed the maximum training hours. An additional 10 hours may be added to the cap (total 210) for OSHA10.
- Pre-apprentice and Journeyman training hours are 8 and 200. An approved justification is required to exceed the maximum training hours.  
*Note: for Productive Laboratory delivery method the maximum training hours are capped at 60 (24 for Small Business).*

**Training Delivery**

- The ratio established for apprentice training by the Local Educational Agency (LEA) will be accepted if the LEA delivers the training. Otherwise, the standard class/lab ratio of 1:20 will apply, although this ratio may be expanded to 1:25 on a case-by-case basis for good cause (apprentice training only).
- General Safety training is allowed for Apprentices if it is part of the Related & Supplemental Instruction curriculum approved by DAS. OSHA 10 is allowed for Apprentices and Pre-apprentices. OSHA 10/30 is allowed for Journeymen and Apprentices.
- Attendance records will be accepted as required by the LEA, but only if the LEA is delivering the training. Otherwise, standard ETP rosters will be required.
- Payment earned under the Apprenticeship Pilot will not be attributed to employers for purposes of assessing a Substantial Contribution or a High-Earner Contribution.

For further information regarding this Pilot program, please contact **ETP's Economic Development Unit**, or call 916-327-5258.



## MEDICAL SKILLS TRAINING

- In October 2008, in an effort to address California's nursing shortage, the panel implemented a Pilot to support the healthcare industry and train nurses. Since then, Medical Skills Training has become a regular part of the Panel's program.
- ETP's Medical Skills Training program supports the healthcare industry by prioritizing training for the career advancement and job security of frontline workers in nursing and allied healthcare occupations.
- Medical Skills Training consists of Didactic (Classroom) and Preceptor (Clinical) Training.
- Preceptor Training is training by a Preceptor/mentor where the trainee observes hands on skills performed by a registered nurse or other practitioner in a productive work environment. Training is typically provided at 1:1 preceptor/trainee ratio, not to exceed 1:10. Training may consist of 100% Preceptor.
- Non-clinical courses such as Continuous Improvement and Computer Skills may be included for all occupations. Delivery may be in a classroom or simulated laboratory, or by Computer Based Training (CBT). CBT is limited to 50% of the total training hours per trainee.
- New Graduate nurses may receive Orientation/basic skills training as part of a new graduate training program. Furthermore, on a case-by-case basis, for good cause, the Panel may consider nurse orientation for incumbent or experienced nurses as well.
- Eligibility for the Medical Skills Training program is limited to frontline workers in nursing and allied healthcare occupations, and there is no requirement to receive clinical training; any occupation may take a combination of training types on the Menu Curriculum.
- A trainee will be considered as employed full-time with a minimum of 24 hours of employment a week provided that level of weekly employment qualifies the employee for a similar employee benefit plan (sick leave, vacation, health, dental, vision, retirement, etc.) on a proportionately equal basis.
- The fixed-fee reimbursement rate for Medical Skills training is \$22 per hour for Didactic and or Preceptor training.
- The standard minimum and maximum training hours are 8 and 200. An approved justification is required to exceed the maximum training hours. Note: for the Productive Laboratory delivery method the maximum training hours are capped at 60 (24 for Small Business).

For further information regarding this Pilot program, please contact ETP's Economic Development Unit, or call 916-327-5258.



## DSH - Napa: Internships / Training

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- Dance Movement Therapy Internship Program
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- Internships / Training
- Occupational Therapy Internship Program
- Psychiatric Pharmacy Clerkship
- Psychiatric Technician Apprenticeship Training Program
- Recreation Therapy Internship Program
- Social Work Internship Program

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## Internships / Training

The Training Department at the Department of State Hospitals (DSH) - Napa arranges and assists staff to meet their annual mandatory trainings. It provides all disciplines the opportunity to earn continued educational units throughout the year, with it's many conferences, workshops and related work trainings. The trainings provided are highly stimulating, motivational and interactive in an effort to assist the healthcare professional in meeting the needs and treatment of our diverse forensic and LPS populations.

The Nursing Education Department at DSH - Napa offers a comprehensive program of orientation and competency validation for nursing staff and continuing education units are available at no cost for hospital employees. A variety of topics for CEU's are presented, including classes on psychiatric and physical disorders and treatment, treatment of the suicidal, violent, or angry client, development of nursing care plans, and an overview of forensic issues. The Nursing Education Department also provides assistance for current employees who are preparing for their state nursing board examination and a tutoring and mentoring program for employees enrolled in a Psychiatric Technician Apprenticeship Program.

Employee career advancement is promoted at this facility through the Career Development Committee. The committee is active in recommending sponsorships for employees who desire advanced education and provides opportunities for employees to improve their interview skills and techniques.



The Medical Staff organizes 48 Grand Rounds presentations each year on clinically oriented topics. Each session qualifies for 1-1/2 hours of CME credit.

## Psychiatric Technician Apprenticeship Training Program

DSH Napa's Psychiatric Technician Apprentice Program offers individuals the opportunity to become licensed Psychiatric Technicians. The apprenticeship program consists of 3,000 hours of on-the-job training plus classroom instruction in mental health, developmental disabilities, nursing science, anatomy and physiology, and pharmacology.

Apprentices in DSH Napa's program will first complete the Hospital's in-house program to become Certified Nurse Assistants. Then they will start the 12-month Napa "Fast Track" Psychiatric Technician education program. Each apprentice receives 40-hour per week pay for attending class and working in the Hospital, assisting medical and nursing staff in the care and treatment of patients with serious mental illnesses. Upon successful completion of the program, apprentices will be eligible to take the State's Psychiatric Technician license examination.

Because Psychiatric Technician Apprentice is a State civil service position represented by California Association of Psychiatric Technicians (CAPT), apprentices are covered under the CAPT contract which provides for salaries, health benefits, holidays, vacations and further defines working conditions.

To enter the Psychiatric Technician Apprentice Program, candidates must have graduated from high school within the United States or the equivalency. If you attended high school outside the United States, it is the responsibility of the candidate to provide an evaluation/certification of their foreign education as to what it represents in terms of U.S. school equivalency. Candidates must also demonstrate proficiency in English/Reading/Math by passing the English/Reading Placement examination for health occupations with a score of 59 or higher and the Math Placement examination with a score of 59 or higher.

We plan to start the Psychiatric Technician Apprentice Program July 2017.

Interested candidates must return a State application and required documents no later than February 10, 2017 to the below address:

Natalie Allen, RN, BSN  
Psychiatric Nursing Education Director  
Training and Education Center  
Department of State Hospitals-Napa  
2100 Napa Vallejo Hwy  
Napa Ca. 94558

Incomplete applications will not be accepted and all documentation must be submitted together. If there are questions regarding this information, please contact Natalie Allen at (707) 254-2437 or (707) 253-5284.

## Recreation Therapy Internship Program

Department of State Hospitals – Napa's Therapeutic Recreation internship program is offered to T.R. students who have completed their required academic training in therapeutic recreation from either a bachelors or masters degreed program. The internship program follows the guidelines and standards as set by the "National Council for Therapeutic Recreation Certification". The Therapeutic Recreation internship program collaborates with each individual university concerning coordination of the NCTRC guidelines, university internship requirements, and the requirements of the hospital. Applicants should demonstrate personal maturity and have a range of professional and life experiences which would qualify them to work with a challenging population.

The objective for the internship program is to provide an intern exposure to high quality, hands-on opportunities for practical applications of therapeutic recreation concepts and techniques. Through a choice of a variety of clinical settings within the realm of services provided to patients with mental illness, the student intern develops the skills necessary to become a recreation therapist. Therapeutic recreation plays an important role in the patient's treatment to help facilitate that individual's ability to move to a lesser restrictive living environment, to possible reintegration back into the community through providing a variety of treatment and leisure programs. Interns will have the opportunity to develop and run treatment services on an individual and group basis.

Treatment and leisure modalities include, but are not limited to, the following:

- Leisure Education and Values Clarification
- Substance Recovery Issues
- Forensic Competency Issues
- Stress Reduction
- Social Skills
- Communication Skills
- Exercise, Weightlifting, Yoga, Sports, and other Body Mechanic Modalities
- Vocational and Pre-vocational Work Training
- Community Re-orientation Programs and Community Outings
- Independent Living Skills
- Group Therapy Modalities
- Music and Art Programs
- Special Event Coordination
- Variety of Free Leisure Time Activities

For further information about the Recreational Therapy Internship Program contact: Jennifer Marshall, CTRS, RTC at E-mail: Jennifer.Marshall@dsh.ca.gov, Phone: (707) 253-5983 or the Chief of Rehabilitation Therapy Services at (707) 253-5037.

## Occupational Therapy Internship Program

The Occupational Therapy (O.T.) internship program at Department of State Hospitals - Napa is offered to O.T. students from around the world who have completed their required academic training from either a bachelors or masters degreed program. The internship program is built around the American Occupational Therapy Association (AOTA) guidelines and complies with the professional standards of AOTA, the involved university or college, and DSH - Napa. O.T. assistant (COTA) fieldwork experiences are also available at Napa State Hospital.

The objective of the internship program is to provide students with the opportunity to integrate academic knowledge with application skills important in the area of psychosocial O.T. practice. This is done under the experienced supervision of an O.T.R., but includes exposure to a wide variety of disciplines and clinical settings.

An interview (personal or videotaped) is required to ensure that the student understands the clinical expectations for this experience. A preference will be given to those who demonstrate self-direction, motivation, and a strong commitment to their new career and the individuals they will be serving.

Interested prospective applicants should contact: Nanci Caron, OTR-O.T. Internship Coordinator at (707) 253-5915 or the Chief of Rehabilitation Therapy Services at (707) 253-5037.

## Art Therapy Internship Program

DSH - Napa's Art Therapy Program has provided internship experiences for dozens of Art Therapy students for over twenty years. Due to its range of services and resources, the Hospital has provided an excellent training ground for Art Therapists from programs throughout the world. Several registered Art Therapists, with years of clinical experience, are employed in the various treatment programs of the hospital, and are capable of providing sensitive and skillful supervision.

In considering applicants for internship, we look for students from American Art Therapy Association approved training programs who have demonstrated a serious commitment to the study and practice of Art Therapy. Applicants should demonstrate personal maturity and have a range of professional and life experiences which would qualify them to work with a challenging population.

For further information about the internship program contact: Ronald P.M.H. Lay, MA, ATR-BC, at (707) 254-2514 or the Chief of Rehabilitation Therapy Services at (707) 253-5585.

## Social Work Internship Program

Napa State Hospital Social Work Services accepts second year graduate students for field placements. Psychiatric Social Workers who supervise these students coordinate the required field placement training with the graduate school. Students have the unique opportunity of gaining a breadth of experience in group and individual psychotherapy, case management, biopsychosocial rehabilitation groups and competency training under the direct supervision of experienced clinicians. They may also take advantage of numerous trainings available through our professional education

departments. Most recently our graduate student interns have come from California State University, Sacramento. In the past we have also had interns from UC Berkeley Graduate School of Social Welfare and California State University, San Francisco.

For further information about the internship program contact: Ann Long, LCSW, Chief, Social Work Services at (707) 253-5737.

## Clinical Psychology Internship Program

The Department of Psychology offers a doctoral internship in clinical psychology. Please click here for more information about our program.

## Dance Movement Therapy

Department of State Hospitals (DSH) – Napa offers internship experiences for Dance Movement Therapy (DMT) students from American Dance Therapy Association (ADTA) approved schools, and those who have chosen the Alternate Route DMT program. Due to its range of services and resources, DSH - Napa provides an excellent training ground for Dance Movement Therapists from programs throughout the country. The Board Certified Dance Movement Therapists (BC-DMT) at DSH - Napa currently offering supervision are employed in various treatment programs of the hospital, and are capable of providing sensitive and skillful supervision. Internships involve the opportunity to work with rehabilitation therapists across disciplines, unit psychiatrists, psychologists, social workers, and nursing staff from a variety of populations.

Responsibilities of the dance movement therapy intern include the following:

- Attending staff meetings
- Facilitating & co-facilitating various groups weekly with a variety of modalities/disciplines
- One hour of individual supervision with BC-DMT supervisor per week, one hour of adjunct supervision with other BC-DMT and therapist co-facilitators per week, and one and a half hours of group DMT supervision with all DMTs on-site per month
- Writing session reports, a mid-internship and final internship self evaluation, and offering a DMT in-service to all Rehab Therapists
- Experiencing individual DMT for oneself
- Ongoing dance training for intern's own personal growth
- Assisting nursing/level of care staff with activities as part of patient contact hours

In considering applicants for internship, we look for students from American Dance Therapy Association approved training programs who have demonstrated a serious commitment to the study and practice of Dance Movement Therapy. Applicants should demonstrate personal maturity and have a range of professional and life experiences which would qualify them to work with a challenging population.

For further information about the Dance Movement Therapy internship program contact: Jeanetta Scholefield, MS, BC-DMT at (707) 253-5000 x3685, or Ingrid Thomas, MA, BC-DMT, GLCMA, NCC, LPCC at (707) 253-5000 x6115

## Dietetic Internship Program

The Department of State Hospitals - Napa offers a Dietetic Internship Program. Please click here for more information about our program.

## Psychiatric Pharmacy Clerkship

The Department of Pharmacy offers a six week Psychiatric Pharmacy Clerkship to fourth year pharmacy students enrolled at the following Schools of Pharmacy: University of California – San Francisco, University of the Pacific, and University of Southern California. The six-week experience enables the student to gain greater understanding of psychiatric treatment modalities. Students are assigned to a treatment unit and participate with the treatment team. They contribute drug information as requested, participate in interdisciplinary team conferences, and make recommendations concerning medication treatment. In addition to unit activity, students attend clinic rounds with the Movement Disorder consultant, lead a number of weekly individual education groups, and present lectures to nursing and pharmacy staff on a variety of topics.

Interested students should contact the Clerkship Coordinator at their school of pharmacy to register for the Psychiatric Pharmacy Clerkship. A syllabus has been provided to each school of pharmacy which provides an overview of the clerkship. For additional questions, students may contact Ali Yasseri, Pharmacy Clerkship Coordinator. He may be reached by telephone at (707) 253-5999 or by email at [Ali.Yasseri@dsh.ca.gov](mailto:Ali.Yasseri@dsh.ca.gov)

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CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

# Occupational Therapy Assistant (8292)

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## California State Personnel Board Specification

- **Schematic Code:** TQ11
- **Class Code:** 8292
- **Established:** 07/13/1978
- **Revised:** --
- **Title Changed:** --

### Definition

Under the supervision of a registered Occupational Therapist, to assist in providing occupational therapy services; and to do such other related duties as required.

### Typical Tasks

Carries out individual or group program or portions thereof as planned by or under the supervision of an Occupational Therapist; assists in administering and scoring routine tests and evaluations to determine clients' daily living skills and capacities; helps plan and implement remedial tasks or activities for clients to meet treatment goals; trains and assists clients in developing skills, interests and life styles that develop self-sufficiency in overcoming disabilities and encourage independent functioning; assists in providing developmental exercise, multiple sensory stimulation, self-care activities, sensory integrative and perceptual motor experience to restore, reinforce or establish sensory-motor, psychosocial and cognitive function and develop self-sufficiency in overcoming disabilities; observes and reports client response to treatment; prepares work materials and assists in maintaining treatment areas and equipment in satisfactory operating condition; maintains safe environment for client; keeps progress notes and post-treatment data in records; may attend clinics; may prepare reports; and may perform clerical and reception activities related to occupational therapy.

### Minimum Qualifications

Certification by the American Occupational Therapy Association as a Certified Occupational Therapy Assistant. (Applicants who are eligible for certification as a Certified Occupational Therapy Assistant will be admitted to

the examination but they must secure the certificate before they will be considered eligible for appointment.)

## Knowledge and Abilities

Knowledge of: Concepts and scope of occupational therapy and its relationships to other health care professions; professional ethics and conduct; human anatomy and physiology; human growth and development; psychosocial and pathophysiological conditions resulting from disease or injury.

Ability to: Establish effective therapeutic relationships with mentally and physically handicapped persons; communicate with disturbed clients; communicate and collaborate effectively with other professional personnel; maintain ethical and professional standards of performance; utilize recognized methods in applying occupational therapy techniques; follow directions and work under close supervision; observe and record responses to treatment; and keep accurate records.

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**DUTY STATEMENT  
CALIFORNIA DEPARTMENT OF VETERANS AFFAIRS**

<b>PART A</b>	
<b>Position No:</b> 576-156-8292-001	<b>Date:</b>
<b>Class:</b> Occupational Therapy Assistant	<b>Name:</b>
<p>Under supervision from of the Chief of Restorative Care Services, with oversight and consultation of program and patients by the Occupational Therapist, the Occupational Therapy Assistant shall provide restorative care to residents who are physically ill, disabled, or convalescent to ensure maintenance of an optimum level of function; participate in interdisciplinary team conferences regarding the restorative needs of residents. Uses therapy techniques to improve functioning and independence as well as to reduce or eliminate the effects of illness or disability and to restore, maintain, or rehabilitate motor skills and activities of daily living.</p>	
Percentage of time performing duties:	<b>ESSENTIAL FUNCTIONS</b>
35%	Under the guidelines of the therapist, assist with rehabilitation and activity programs for residents. Encourage and assist residents in maintaining or developing muscle tone and range of motion for increased self-functioning in activities of daily living. Utilize proper range of motion techniques on all extremities. Conduct exercise sessions for residents. Assist residents as needed to reach destinations.
30%	Under the guidelines of the therapist, assist with ambulation program, positioning, and feeding program. Assist and encourage residents in accepting and using special devices and adaptive equipment prescribed for their physical comfort or rehabilitation. Assist with dressing, positioning, ambulating and transferring residents. Monitor residents for pressure areas.
10%	Coordinate, at least weekly, with Occupational Therapist on new admissions and transfers, resident restorative needs, recommendations, scheduling, concerns, evaluations and outcomes. Coordinate, as needed, with interdisciplinary team members to include unit nursing staff, activity staff and social workers to ensure a holistic approach in maximizing the residents' potential for self-care.
10%	Complete accurate weekly summary documentation of programs and treatment modalities and their effectiveness to show residents' progress or regression in the restorative program. Provide daily treatment progress log charting. Ensure all documentation is properly filed. Properly store equipment and supplies in a neat and organized manner. Identify safety concerns. Attend safety committee meetings.
10%	Provide care and tend to physical needs of residents as required and as defined by California Code of Regulations, Title 22, Division 5, Chapter 2.5, Article 3, 71835 through 71841.
<b>NON-ESSENTIAL FUNCTIONS</b>	
5%	Other related duties as assigned.

Position No. 576-156-8292-001	Date:
Class: Occupational Therapy Assistant	Name:
<b>PART B - PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS</b>	

Activity	Not Required	Less than 25%	25% to 49%	50% to 74%	75% or More
<b>VISION:</b> View computer screen; prepare various forms, memos, reports, letters, and proofread documents.					X
<b>HEARING:</b> Answer telephone; communicate with Administration, department managers, department staff; provide verbal information.					X
<b>SPEAKING:</b> Communicate with staff, residents and the public in person and via telephone; interact in meetings.					X
<b>WALKING:</b> Within the home to the various units.				X	
<b>SITTING:</b> Work station, meetings and training.		X			
<b>STANDING:</b> Copy documents; review records.					X
<b>BALANCING:</b>		X			
<b>CONCENTRATING:</b> Review documentation for accuracy; complete forms, observe residents.					X
<b>COMPREHENSION:</b> Understand resident needs; laws, rules, regulations, policies and procedures; content of meetings, trainings and work discussions; facilitate the dynamic of team work.					X
<b>WORKING INDEPENDENTLY:</b> Must be able to apply laws, rules and processes with minimal guidance.					X
<b>LIFTING UP TO 10 LBS OCCASSIONALLY:</b>				X	
<b>LIFTING UP TO 20 LBS OCCASSIONALLY AND/OR 10 LBS FREQUENTLY:</b>			X		
<b>LIFTING 25-50 LBS OCCASSIONALLY AND/OR 20 LBS FREQUENTLY:</b>		X			
<b>FINGERING:</b> Push telephone buttons, calculator keys, and computer keyboard.		X			
<b>REACHING:</b> Answer telephone; use a mouse; print documents on desk printer.				X	
<b>CARRYING:</b> Transport documents, mail.		X			
<b>CLIMBING:</b>		X			
<b>BENDING AT WAIST:</b> Use copier; access low file drawers.			X		
<b>KNEELING:</b> Access low file drawers.		X			
<b>PUSHING OR PULLING:</b> Open and close file drawers.			X		
<b>HANDLING:</b> Charts; medical equipment.				X	
<b>DRIVING:</b> Special events.		X			
<b>OPERATING EQUIPMENT:</b> Computer; telephone; copier, printer, fax machine; medical equipment.			X		
<b>WORKING INDOORS:</b> Enclosed office environment.					X
<b>WORKING OUTDOORS:</b> Special events.			X		
<b>WORKING IN CONFINED SPACE:</b> File, supply, storage rooms, etc.		X			

I have read and understand the duties listed on this Duty Statement and I can perform these duties with or without reasonable accommodation. (If reasonable accommodation may be necessary, discuss any concerns with the Equal Employment Opportunity Office.)

Employee signature \_\_\_\_\_ Date \_\_\_\_\_

Supervisor signature \_\_\_\_\_ Date \_\_\_\_\_

Human Resources signature \_\_\_\_\_ Date \_\_\_\_\_