

## **AGENDA ITEM 14**

**DISCUSSION ON THE BOARD'S FUND CONDITION AND POSSIBLE INCREASE OF LICENSE RENEWAL AND OTHER MISCELLANEOUS FEES TO MAINTAIN SOLVENCY.**

**3017 - Board of Occupational Therapy  
2021-22 FM 13 and Future Projections**

	<b>Actual 2019-20</b>	<b>Actual 2020-21</b>	<b>CY 2021-22</b>	<b>BY +1 2022-23</b>	<b>BY +2 2023-24</b>	<b>BY +3 2024-25</b>
<b>BEGINNING BALANCE</b>	\$2,203	\$1,850	\$1,539	\$1,118	\$678	\$86
Prior Year Adjustment	-\$106	\$0	\$0	\$0	\$0	\$0
Adjusted Beginning Balance	\$2,097	\$1,850	\$1,539	\$1,118	\$678	\$86
<b>REVENUES, TRANSFERS AND OTHER ADJUSTMENTS</b>						
Revenues						
4121200 - Delinquent fees	\$37	\$41	\$46	\$47	\$47	\$47
4127400 - Renewal fees	\$1,774	\$2,003	\$2,297	\$2,522	\$2,522	\$2,522
4129200 - Other regulatory fees	\$53	\$24	\$41	\$41	\$41	\$41
4129400 - Other regulatory licenses and permits	\$349	\$379	\$419	\$427	\$427	\$427
4143500 - Miscellaneous services to the public	\$33	\$33	-	-	-	-
4163000 - Income from surplus money investments	\$47	\$10	-	-	-	-
4171400 - Escheat of unclaimed checks and warrants	\$1	\$0	-	-	-	-
4173500 - Settlements and Judgments -	\$0	\$1	-	-	-	-
Other Revenue		\$44	\$39	\$36	\$36	\$36
<b>Totals, Revenues</b>	<b>\$2,294</b>	<b>\$2,490</b>	<b>\$2,842</b>	<b>\$3,073</b>	<b>\$3,073</b>	<b>\$3,073</b>
General Fund Transfers and Other Adjustments	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENT</b>	<b>\$2,294</b>	<b>\$2,490</b>	<b>\$2,842</b>	<b>\$3,073</b>	<b>\$3,073</b>	<b>\$3,073</b>
<b>TOTAL RESOURCES</b>	<b>\$4,391</b>	<b>\$4,340</b>	<b>\$4,381</b>	<b>\$4,191</b>	<b>\$3,751</b>	<b>\$3,159</b>

	Actual 2019-20	Actual 2020-21	CY 2021-22	BY +1 2022-23	BY +2 2023-24	BY +3 2024-25
<b>EXPENDITURES AND EXPENDITURE ADJUSTMENTS</b>						
Expenditures:						
1111 Program Expenditures (State Operations)	\$2,314	\$2,640	\$3,317	\$3,417	\$3,519	\$3,625
		<i>Projected future savings</i>	<b>-\$350</b>	<b>-\$200</b>	<b>-\$150</b>	<b>-\$150</b>
GSI Increase	\$0	\$0	\$99	\$99	\$99	\$99
9892 Supplemental Pension Payments (State Operations)	\$42	\$42	\$42	\$42	\$42	\$42
9900 Statewide Pro Rata	\$185	\$119	\$155	\$155	\$155	\$155
<b>TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENT</b>	\$2,541	\$2,801	\$3,263	\$3,513	\$3,665	\$3,771
<b>FUND BALANCE</b>						
Reserve for economic uncertainties	\$1,850	\$1,539	\$1,118	\$678	\$86	-\$611
Months in Reserve	7.9	5.7	3.8	2.2	0.3	-1.9

**Historical Budget Authority/Expenditures/Funds Reversion**

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17	FY 2017-18	FY 2018-19	FY 2019-20	FY 2020-21
<i>Board Budget/ Expenditure Authority</i>	1367	1422	1469	1372	1520	1360	1,437	2,337	2,299	2,348	2,497	3,008
<i>Additional Authority/ Direct Draws</i>	0	0	0	0	6	1	2	61	85	220	227	161
<b>TOTAL Authority</b>	1,367	1,422	1,469	1,372	1,526	1,361	1,439	2,398	2,384	2,568	2,724	3,169
<i>Actual Board Expenditures</i>	990	1,110	1,267	1,240	1,429	1,197	1,283	1,796	2,185	2,151	2,314	2,640
<b>Underexpenditure/ \$ Reverted to Fund</b>	<b>377</b>	<b>312</b>	<b>202</b>	<b>132</b>	<b>91</b>	<b>163</b>	<b>154</b>	<b>541</b>	<b>114</b>	<b>197</b>	<b>183</b>	<b>368</b>

Direct Draws are:  
*Supplemental Pension*  
*Statewide Prorata*

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17	FY 2017-18	FY 2018-19	FY 2019-20	FY 2020-21
<b>Budget Authority</b>	1367	1422	1469	1372	1520	1360	1,437	2,337	2,299	2,348	2,497	3,008
<b>Expenditures</b>	990	1,110	1,267	1,240	1,429	1,197	1,283	1,796	2,185	2,151	2,314	2,621
<b>Direct Draws From t</b>	0	0	0	0	6	1	2	61	85	220	227	161
<b>Underexpenditure/ Savings Revert to Fund</b>	<b>377</b>	<b>312</b>	<b>202</b>	<b>132</b>	<b>85</b>	<b>162</b>	<b>152</b>	<b>480</b>	<b>29</b>	<b>-23</b>	<b>-44</b>	<b>226</b>

<b>Fee Schedule and Revenue</b> (list revenue dollars in thousands)							
Fee	Current Fee Amount	Statutory Limit	FY 2016-17 Revenue	FY 2017-18 Revenue	FY 2018-19 Revenue	FY 2019-20 Revenue	FY 2020-21 Revenue
Biennial Renewal OT	270	270	842	1,224	1,395	1,440	1,634
Biennial Renewal OTA	210	210	179	231	263	281	314
OT Restore License to Active Status	270	270	0	0	0	1	2
OTA Restore License to Active Status	210	210	0	0	0	0	0
OT Inactive Renewal	270	270	11	29	49	44	42
OTA Inactive Renewal	210	210	2	5	10	7	9
Delinquent Renewal - OT	135	135	17	22	25	30	34
Delinquent Renewal - OTA	105	105	4	4	5	7	7
Citation & Fine	various	various	24	43	33	48	19
OT Duplicate License Fee	25	25	3	5	4	3	4
OTA Duplicate License Fee	25	25	1	1	1	1	1
FTB Cite & Fine Collection	various	various	2	0	1	2	0
OT Initial License - varies	various	various	136	219	206	201	221
OTA Initial License - varies	various	various	47	63	61	56	54
OT Limited Permit	100	100	3	4	4	3	6
OTA Limited Permit	100	100	1	1	1	1	1
OT Retired Status	25	25	1	3	4	3	3
OTA Retired Status	25	25	0	1	1	1	1
OT Application fee	50	50	61	72	72	65	69
OTA Application fee	50	50	23	26	27	23	19
Suspended Revenue	various	various	9	5	-1	1	1

## ***Other Healing Arts Boards' Population Size and Fees Charged***

<b><i>Healing Arts Boards</i></b>	<b>Lic Pop</b>	<b>EEs</b>	<b>Application Fee</b>	<b>Renewal Fee</b>	<b>Annual Biennial</b>
<b>Acupuncture Board</b>	12,247	15.0	\$250	\$500	B
<b>Board of Chiropractic Examiners</b>	18,281	20.0	\$371	\$313	A
<b>Dental Hygiene Committee</b>	18,671	13.0	\$200	\$160	B
<b>Naturopathic Medicine Committee</b>	1,172	2.0	\$400	\$800	B
<b>Occupational Therapy Board</b>	18,308	15.2			
<b>Occupational Therapist</b>			\$50	\$270	B
<b>Occupational Therapy Asst.</b>			\$50	\$220	B
<b>Board of Optometry</b>	31,937	13.4	\$150	\$200	B
<b>Physical Therapy Board</b>	41,986	26.1	\$300	\$300	B
<b>Physician Assistant Committee</b>	13,927	9.0	\$25	\$312	B
<b>Board of Podiatric Medicine</b>	2,563	5.0	\$100	\$900	B
<b>Board of Psychology</b>	23,441	29.0	\$40	\$430	B
<b>Respiratory Care Board</b>	23,588	17.4	\$300	\$250	B
<b>Speech-Language Pathology and Audiology and Hearing Aid Dispensers</b>	35,171	13.6			
<b>Speech-Language Path.</b>			\$60	\$110	B
<b>Audiologist</b>			\$60	\$110	B
<b>Hearing Aid Dispensers</b>			\$300	\$280	A
<b>Veterinary Medical Board</b>	36,093	24.7			
<b>Veterinarian</b>			\$350	\$500	B
<b>Vet Tech</b>			\$350	\$350	B

Licensing population and board staff size as of June 30, 2020

## **AGENDA ITEM 15**

**DISCUSSION ON THE FIELDWORK COMMUNICATIONS WORKGROUP  
RECOMMENDED LETTERS TO BE SENT OUT REGARDING  
SUPERVISING STUDENTS COMPLETING LEVEL II FIELDWORK.**



Date

Dear Medical Education Department, Clinical Coordinator, or Director of Rehabilitation:  
**{What additional titles could be included here?}**

We would like to recognize and thank you for your hard work!

Securing occupational therapy student fieldwork placements can be challenging yet the effects of COVID-19 has been devastating to those trying to enter the profession. Your occupational therapists (OTs) and occupational therapy assistants (OTAs) are battling on the frontlines to provide essential services while trying to stay safe and balance the needs of their families. Unfortunately, the past year and half has caused 'burnout' among many practitioners and there are few new graduates to enter the profession to ease the burden.

**We have a suggestion to help you and your OTs and OTAs who are all under undeniable stress:**

**Occupational therapy students completing their Level II Fieldwork!**

Level II students, located throughout the state, are skilled and educated clinicians who can help alleviate the demand placed on your scheduling needs and your OTs and OTAs.

California's 15+ occupational therapy programs have an urgent need for more than **1,000+** students who need to complete their Level II rotations. The California Occupational Therapy Fieldwork Council (Council), comprised of Academic Fieldwork Coordinators from all of California's OT and OTA programs, is available to assist you whether your organization/facility educates students regularly or may plan to do so in the future. The Council's goal is to support you and your OTs/OTAs through the process.

The Council is flexible, creative, and willing to help you build a fieldwork program from the ground up. They have resources to support any setting, including skilled nursing, community-based, in-patient or out-patient rehabilitation, pediatrics, or any private practice, including those providing telehealth. The Council can share the latest evidence-based interventions, provide access to up-to-date regulations and accreditation standards. The Council can create a program that will not only support but invigorate and inspire your practice.

**Please help California's occupational therapy students get back on track.**

**This can't be done without you and your support.**



All occupational therapy students must complete either 8,10, or 12 weeks of full-time clinical education. That means actual provision of OT services on persons or populations.

The Council can help organize and streamline the fieldwork placement process. If you have not placed students before, you are NOT alone and the Council or an OT/OTA program near you can help.

Did you know that OTs can now open a case and be the other discipline in Home Health? The American Occupational Therapy Association fought hard and won the battle over this outdated and obsolete law.

To find a school please visit: [https://bot.ca.gov/applicants/ot\\_schools.shtml](https://bot.ca.gov/applicants/ot_schools.shtml) or [https://bot.ca.gov/applicants/ota\\_schools.shtml](https://bot.ca.gov/applicants/ota_schools.shtml)

To contact an Academic Fieldwork Coordinator to get started please visit [www.caotfc.org](http://www.caotfc.org)

Thank you for your time and consideration.

Sincerely,

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Dear Occupational Therapy Practitioner,

The California Board of Occupational Therapy (Board) would like to recognize and thank you for your hard work! The effects of COVID-19 are widespread and devastating. Occupational therapy practitioners are battling on the frontlines while balancing family needs at home. The California OT Fieldwork Council (Council) would like to help you.

The Council is comprised of Academic Fieldwork Coordinators from all California OT schools. The Council is flexible, creative and willing to help you build a fieldwork program from the ground up. They have resources to support you in any setting; whether you work in skilled nursing, community-based, or provide telehealth the Council can create a program that will invigorate and inspire your practice.

The Council can share the latest evidence-based interventions, provide access to up-to-date regulations and accreditation standards. Did you know that OTs can now open a case and be the other discipline in Home Health? AOTA fought and won the battle over this outdated and obsolete law.

Were you aware that you can earn PDUs for Level I and Level II Fieldwork supervision? Recognized by the Board and NBCOT, you can earn 1 PDU per week for full-time fieldwork supervision.

The pandemic effectively paused the educational journey for ALL OT and OTA students. Many students from the Class of 2020 still have not completed their Level II clinical rotations. There are practitioners under undeniable stress but there are few new graduates to ease the burden. Occupational therapy education programs and their students are in urgent need of Level II Fieldwork placements!!

Please help get California's students back on track and ensure they can complete their education and join the profession. ***This cannot be done without you.***

To find a school please visit the Board's website at [www.bot.ca.gov](http://www.bot.ca.gov). You can also contact an Academic Fieldwork Coordinator to get started. The Council's website is [caotfc.org](http://caotfc.org)

Thank you for your time and consideration of this very important request.

Sincerely,

XXXXX

## **AGENDA ITEM 16**

**DISCUSSION ON THE FIELDWORK COMMUNICATIONS WORKGROUP  
RECOMMENDED AMENDMENTS TO BUSINESS AND PROFESSIONS  
CODE SECTIONS 2570.4 AND 2570.6.**

# OTD COMMITTEE RECOMMENDED EDITS TO BUSINESS AND PROFESSIONS CODE

## Section 2570.4

Nothing in this chapter shall be construed as preventing or restricting the practice, services, or activities of any of the following persons:

- (a) Any person licensed or otherwise recognized in this state by any other law or regulation when that person is engaged in the profession or occupation for which he or she is licensed or otherwise recognized.
- (b) Any person pursuing a supervised course of study leading to a degree or certificate in occupational therapy at an accredited educational program, if the person is designated by a title that clearly indicates his or her status as a student or trainee.
- (c) Any person completing a supervised entry level doctorate capstone experience or fulfilling the supervised fieldwork experience requirements of subdivision ~~(e)~~ (d) of Section 2570.6, if the experience constitutes a part of the experience necessary to meet the requirement of that provision.
- (d) Any person performing occupational therapy services in the state if all of the following apply:
  - (1) An application for licensure as an occupational therapist or an occupational therapy assistant has been filed with the board pursuant to Section 2570.6 and an application for a license in this state has not been previously denied.
  - (2) The person possesses a current, active, and nonrestricted license to practice occupational therapy under the laws of another state that the board determines has licensure requirements at least as stringent as the requirements of this chapter.
  - (3) Occupational therapy services are performed in association with an occupational therapist licensed under this chapter, and for no more than 60 days from the date on which the application for licensure was filed with the board.
- (e) Any person employed as an aide subject to the supervision requirements of this section.

## Section 2570.6

An applicant applying for a license as an occupational therapist or as an occupational therapy assistant shall file with the board a written application provided by the board, showing to the satisfaction of the board that he or she meets all of the following requirements:

- (a) That the applicant is in good standing and has not committed acts or crimes constituting grounds for denial of a license under Section 480.
- (b) (1) That the applicant has successfully completed the academic requirements of an educational program for occupational therapists or occupational therapy assistants that is approved by the board and accredited by the American Occupational Therapy Association's Accreditation Council for Occupational Therapy Education (ACOTE), or accredited or approved by the American Occupational Therapy Association's (AOTA) predecessor organization, or approved by AOTA's Career Mobility Program.
  - (2) The curriculum of an educational program for occupational therapists shall contain the content required by the ACOTE accreditation standards, or as approved by AOTA's predecessor organization, or as approved by AOTA's Career Mobility Program.

(c) (1) For an applicant who is a graduate of an occupational therapy or occupational therapy assistant educational program who is unable to provide evidence of having met the requirements of paragraph (2) of subdivision (b), he or she may demonstrate passage of the examination administered by the National Board for Certification in Occupational Therapy, the American Occupational Therapy Certification Board, or the American Occupational Therapy Association, as evidence of having successfully satisfied the requirements of paragraph (2) of subdivision (b).

(2) For an applicant who completed AOTA's Career Mobility Program, he or she shall demonstrate participation in the program and passage of the examination administered by the National Board for Certification in Occupational Therapy, the American Occupational Therapy Certification Board, or the American Occupational Therapy Association, as evidence of having successfully satisfied the requirements of paragraphs (1) and (2) of subdivision (b).

(d) That the applicant has successfully completed a period of supervised fieldwork experience approved by the board, and arranged by a recognized ACOTE-accredited educational institution where ~~he or she~~ the applicant has met the academic requirements of subdivision (b), ~~or (c) or arranged by a nationally recognized professional association~~. The fieldwork requirements for applicants applying for licensure as an occupational therapist or ~~certification~~ as an occupational therapy assistant shall be consistent with the requirements of the ACOTE accreditation standards, or AOTA's predecessor organization, or AOTA's Career Mobility Program, that were in effect when the applicant completed ~~his or her~~ their educational program.

(e) That the applicant has successfully completed a supervised entry-level doctorate capstone experience and all experiences approved by the board and arranged by an ACOTE-accredited educational institution where the applicant has met the academic requirements of subdivision (d). The capstone requirement for applicants applying for licensure as an occupational therapist shall be consistent with the ACOTE accreditation standards in effect when the applicant completed the entry-level occupational therapy doctorate program.

~~(e)~~ (f) That the applicant has passed an examination as provided in Section 2570.7.

~~(f)~~ (g) That the applicant, at the time of application, is a person over 18 years of age, is not addicted to alcohol or any controlled substance, and has not committed acts or crimes constituting grounds for denial of licensure under Section 480.

## **AGENDA ITEM 17**

**DISCUSSION AND EVALUATION OF CRITERIA LISTED FOR APPOINTMENT OF COMMITTEE MEMBERS AS SPECIFIED IN THE BOARD MEMBER GUIDELINES AND PROCEDURE MANUAL.**

# Extract from Board Member Guidelines and Procedures Manual – Committee Member Qualifications

Updates requested at May 21, 2021, meeting

## Minimum Qualifications

Board Policy – February 21, 2008

The minimum qualifications for a non-Board member licensee to participate on a committee are:

- ~~Five~~ three years of professional experience.
- An occupational therapist or occupational therapy assistant whose license was placed on retired status within five years of holding an active license.
- An occupational therapist or occupational therapy assistant holding a current, active, and unrestricted license.
- No pending, current or prior disciplinary action.

Language re: non-licensee/public member committee appointment criteria

### PTBC

The composition of the committees and the appointment of the members shall be determined by the Board president in consultation with the vice president, and the executive officer. Committees may include the appointment of non-Board members.

### SB

The composition of the committees and the appointment of the members shall be determined by the Board Chair in consultation with the Vice Chair and the Executive Officer. In determining the composition of each committee, the Chair shall solicit interest from the Board Members during a public meeting. The Chair shall strive to give each Board Member an opportunity to serve on at least one committee. Appointment of non-Board Members to a committee is subject to the approval of the Board.

No committee criteria: BBS, DHCC, RCB