

Subject RE: A couple more edits from the ad hoc meeting

Hi all -

One more proposed edit, clarifying the OTA has something to do with the OT services:

*Any business or organization providing occupational therapy services shall have a documented plan for clinical supervision of occupational therapy practitioners when an occupational therapy assistant is in an administrative role related to these therapy services. This document shall include provision for ongoing and formal evaluation of clinical performance. This document must be available at time of hire, contract negotiation, and immediately available upon request. "Clinical supervision" refers to those activities included in the American Occupational Therapy Association's "Standards of Practice for Occupational Therapy" (2005).*

What we prepared on Friday:

*Any business owner providing occupational therapy services shall have a documented plan for clinical supervision of occupational therapy practitioners when an occupational therapy assistant is in an administrative role. This document shall include provision for ongoing and formal evaluation of clinical performance. This document must be available at time of hire, contract negotiation, and immediately available upon request. "Clinical supervision" means those activities included in the American Occupational Therapy Association's "Standards of Practice for Occupational Therapy" (2005).*

## Article 9. Supervision of Occupational Therapy Assistants, Limited Permit Holders, Students, and Aides

### § 4180. Definitions

In addition to the definitions found in Business and Professions Code sections 2570.2 and 2570.3 the following terms are used and defined herein:

- (a) "Client related tasks" means tasks performed as part of occupational therapy services rendered directly to the client.
- (b) "Level I student" means an occupational therapy or occupational therapy assistant student participating in activities designed to introduce him or her to fieldwork experiences and develop an understanding of the needs of clients.
- (c) "Level II student" means an occupational therapy or occupational therapy assistant student participating in delivering occupational therapy services to clients with the goal of developing competent, entry-level practitioners.
- (d) "Level II fieldwork educator" means a licensed occupational therapist or occupational therapy assistant who has a minimum of one year of practice experience following issuance of a license or other authorization to practice issued by another state regulatory board.
- (e) "Non-client related tasks" means clerical and secretarial activities; transportation of patients/clients; preparation or maintenance of treatment equipment and work area; taking care of patient/client personal needs during treatments; and assisting in the construction of adaptive equipment and splints.
- (f) "Periodic" means at least once every 30 days.
- (g) "Clinical supervision," as used in this article, refers to those activities included in the American Occupational Therapy Association's document entitled "Standards of Practice for Occupational Therapy" (Adopted 2005), incorporated herein by reference.

Note: Authority cited: Sections 2570.13 and 2570.20, Business and Professions Code. Reference: Sections 2570.2, 2570.3, 2570.4, 2570.5, 2570.6, and 2570.13, Business and Professions Code.

### § 4181. Supervision Parameters

- (a) Appropriate supervision of an occupational therapy assistant includes, at a minimum:
  - (1) The weekly review of the occupational therapy plan and implementation and periodic onsite review by the supervising occupational therapist. The weekly review shall encompass all aspects of occupational therapy services and be completed by telecommunication or onsite.
  - (2) Documentation of the supervision, which shall include either documentation of direct client care by the supervising occupational therapist, documentation of review of the client's medical and/or treatment record and the occupational therapy services provided by the occupational therapy assistant, or co-signature of the occupational therapy assistant's documentation.
  - (3) The supervising occupational therapist shall be readily available in person or by telecommunication to the occupational therapy assistant at all times while the occupational therapy assistant is providing occupational therapy services.
  - (4) The supervising occupational therapist shall provide periodic on-site supervision and observation of client care rendered by the occupational therapy assistant.
- (b) The supervising occupational therapist shall at all times be responsible for all occupational therapy services provided by an occupational therapy assistant, a limited

**§ 4183. Treatments Performed by Occupational Therapy Limited Permit Holders and Students**

**§ 4184. Delegation of Tasks to Aides**

**§ 4187. Supervision Plan**

Any business or organization providing occupational therapy services shall have a documented plan for clinical supervision of occupational therapy practitioners when an occupational therapy assistant is in an administrative role related to these therapy services. This document shall include provision for ongoing and formal evaluation of clinical performance. This document must be available at time of hire, contract negotiation, and immediately available upon request.

Note: Authority: Sections 2570.13 and 2570.20, Business and Professions Code. Reference: Sections 2570.2, 2570.4 and 2570.13, Business and Professions Code.