



## **AD HOC ON SUPERVISION STANDARDS MEETING MINUTES**

**April 12, 2024**

Committee Members Present

Denise Miller, OT, Board Member/Chair  
 Beata Morcos, Board Member  
 Sharon Pavlovich, OTA, Board Member  
 Ada Boone Hoerl, OTA  
 Candace Chatman, OT  
 Erin Schwier, OT  
 Joyce Fries, OT  
 Kersten Laughlin, OT  
 Liz Phelps, OT  
 Penny Stack, OT  
 Samia Rafeedie, OT  
 Terry Peralta-Catipon, OT

Board Staff Present

Heather Martin, Executive Officer  
 Rachael Hutchison, Analyst  
 Jeanine Orona, Analyst

Committee Members Absent

Cesar Arda, OT  
 Domenique Hendershot-Embrey, OT  
 Heather Kitching, OT  
 Jessica Padilla, OTA  
 Julie Mclaughlin Gray, OT  
 Sheryl Ryan, OT

**Friday, April 12, 2024**

**3:00 pm – Committee Meeting**

*The public may provide comment on any issue before the Board at the time the agenda item is discussed. If public comment is not specifically requested, members of the public should feel free to request an opportunity to comment.*

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

The meeting was called to order at 3:03 p.m., roll was called, and a quorum was established.

2. Chairperson opening remarks.

Chair Denise Miller thanked all the committee volunteers and members of the public for their attendance at the meeting. Chair Miller remarked that moving forward the Ad Hoc on Supervision Standards Committee would be meeting on a regular basis to discuss matters relevant to supervision.

The purpose of the committee is to review supervision standards and to make recommendations to the Board for regulatory language. The Board relies on input from the professionals that are out there in the field working with students.

3. Introductions by all Committee Members.

All committee members present chose to introduce themselves.

4. Public Comment for Items Not on the Agenda.

There were no public comments for items not on the agenda.

5. Consideration and possible recommendation to the Board on amending California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4180, Definitions.

Chair Miller acknowledged that the language for amending California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4180, Definitions was previously approved by the Board, however, Ms. Miller opened up the discussion to the panelists.

A robust discussion ensued regarding the term “ACOTE-accredited.” It was pointed out that some programs have students fulfilling their capstone experience during the pre-accreditation phase, therefore, using the phrase, “ACOTE-accredited and pre-accredited doctoral degree program” was recommended.

Erin Schwier noted that “pre-accreditation” meant that your program had submitted the self-study or were about to do so. Then the self-study would be paper reviewed in anticipation of your onsite review, which would happen three months later. The onsite review timeline would depend on when that Board met. Typically, a recommendation regarding the accreditation would be made following the onsite review.

A lengthy discussion involving the ACOTE accreditation process resulted.

Ms. Stack suggested the language, “educational programs that are in the process of receiving their ACOTE accreditation”

Executive Officer Heather Martin stated that she would not recommend using “pre-accredited” before “accredited.”

Ms. Miller suggested, “while enrolled in an ACOTE accredited doctoral degree program, including pre-accreditation.”

Ms. Rafeedie suggested reaching out to ACOTE about the committee's recommended language.

Ms. Martin replied that she would reach out to Dr. Teresa Bringer, Director of Accreditation at ACOTE to attend a committee meeting.

Ms. Miller stated that the recommendation from the Supervision Standards Committee to the Board was to take out the ACOTE language in Section 4180(c).

### **Public Comment**

Kristen Neville, American Occupational Therapy Association (AOTA) State Affairs Manager, agreed that inviting a representative from ACOTE to attend a future meeting would be a good idea.

There were no additional committee member remarks.  
There were no additional public comments.

6. Consideration and possible recommendation to the Board on amending California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4181, Supervision Parameters.

Chair Miller acknowledged that the language for amending California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4181, Supervision Parameters was already approved by the Board.

Ms. Miller summarized the letter from Dr. Shane Jorwin Gemoto, Academic Fieldwork Coordinator and Assistant Professor at Loma Linda University's Department of Occupational Therapy dated April 10, 2024, wherein concerns about the Board's proposed changes to fieldwork and the Doctor of Occupational Therapy (OTD) Capstone supervision were addressed.

Ms. Miller stated that when discussing the language of Section 4181, the committee had a very distinguished panel that resulted in a robust conversation to get to the proposed numbers.

Sharon Pavlovich expressed her concern regarding 4181(3)(f) and the use of the term, "services." Yes, the occupational therapy practitioner provides services, however, they also educate. Ms. Pavlovich felt that the word "services" was limiting. Ms. Pavlovich suggested using the language, "prior to when providing occupational therapy services, education, supervision, and practice."

Ms. Martin suggested language for 4181(f), "the supervising occupational therapist shall determine that the occupational therapy practitioner possesses a current license or permit when providing occupational therapy services, education, supervision, and practice" or "the supervising occupational therapist shall determine that an occupational therapist or occupational therapy assistant possesses a current license or permit prior to providing occupational therapy services, education, supervision, practice, or conducting research."

Ms. Rafeedie believed that the term “services” encompassed everything and the language should not have to spell each area out.

Ms. Miller agreed with Ms. Rafeedie.

Ms. Pavlovich added that her concern is that people do not equate education with occupational therapy services.

Elizabeth “Liz” Phelps suggested defining occupational services in the general provisions.

Ms. Hoerl believed that the language should say, “faculty led clinical fieldwork” because she taught virtual fieldwork classes which have zero patient safety concerns.

Ms. Rafeedie attended the November 2023 Board meeting at which the ratios were discussed, and the public had questions as to how the Board reached those ratios. She summarized the list of next steps that came from that meeting.

Ms. Hoerl said that her research revealed that California is the only state in the top five that has any kind of Supervision cap at all. In the other four states there was no reference to any kind of limitation.

Terri Peralta-Catipon noted that she had concerns about circumstances in which the doctoral capstone student who was supervising students was not from a doctoral occupational therapy program that was ACOTE accredited.

It was pointed out that although a student requires mentorship to complete their post professional capstone, they do require supervision of their practice. However, a student completing an entry-level doctoral capstone would need supervision similar to a student completing their fieldwork, a limited permit holder, or an occupational therapy assistant.

Ms. Miller concluded that Ms. Rafeedie had provided the next steps for where the Supervision Standards Committee would go moving forward that included: looking at literature and statistics to see if the proposed ratios were justified; consulting with a representative from ACOTE and inviting them to a committee meeting; researching what the majority of the states were doing and how they look at the ratios; inviting the public to join meetings; inviting educators back to the committee to continue the discussion; discussing what “at any one time” means; and conducting a survey to ask other states were doing regarding supervision limitations and look at their practice acts.

### **Public Comment**

Kristen Neville, American Occupational Therapy Association (AOTA) State Affairs Manager, stated that she had information about supervision requirements across the country from AOTA that she would share with the committee.

There were no additional committee member remarks.

There were no additional public comments.

7. Consideration and possible recommendation to the Board on other regulations effected by proposed amendments to California Code of Regulations (CCR), Title 16, Division 39, Article 9, Sections 4180 and 4181.

Ms. Miller summarized that the Supervision Standards Committee wanted to bring California Code of Regulations (CCR), Title 16, Division 39, Article 9, Sections 4180 and 4181 back to the Supervision Standards Committee for further discussion.

There were no additional committee member remarks.  
There were no public comments.

8. Consideration of Board-approved legislative proposal amending Business and Professions Code Sections 2570.4 and 2570.6 and recommendation on proposed edits and rationale to support the proposed amendments.

Ms. Martin confirmed that the language for Business and Professions Code Sections 2570.4 and 2570.6 was previously approved by the Board. Ms. Martin hoped to get more information in the future regarding rationale from the Senate Business, Professions and Economic Development Committee.

There were no additional committee member remarks.  
There were no public comments.

9. Consideration and possible recommendation to the Board on whether the education and training requirements for licensees demonstrating competence in the advanced practice areas should be reduced.

*This agenda item was tabled.*

Meeting Adjournment

The meeting adjourned at 5:10 p.m.