

AGENDA ITEM 5

**REVIEW AND VOTE ON APPROVAL OF THE DECEMBER 13,
2024, BOARD MEETING MINUTES.**



****DRAFT****

BOARD MEETING MINUTES

December 13, 2024

**Department of Consumer Affairs
Ruby Room
1747 North Market Boulevard
Sacramento, CA 95834**

Board Members Present

Richard Bookwalter – Board President
Beata Morcos – Board Vice President
Lynna Do – Board Secretary
Hector Cabrera
Denise Miller
Sharon Pavlovich

Staff Member Present

Heather Martin, Executive Officer
Jody Quesada Novey, Manager
Austin Porter, Analyst

Board Members Absent

Christine Wietlisbach

Friday, December 13, 2024

11:53 am - Board Meeting

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

The meeting was called to order at 11:53 a.m. Vice President Beata Morcos called roll and a quorum was established.

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

Board President, Richard Bookwalter announced that the Board would be interviewing two candidates for the Executive Officer (EO) position, which would be conducted in closed session.

Mr. Bookwalter, welcomed and thanked Department of Consumer Affairs (DCA) Human Resources staff Nicole Le, Catherine Bachiller and Stephanie Louie for assisting the

Board throughout the hiring process and Solid's Shelly Jones for assisting with the setup of WebEx.

Mr. Bookwalter also welcomed Executive Officer Heather Martin to her final Board meeting. He thanked her for her many years of service, achievements, and dedication to the Board. Mr. Bookwalter that Ms. Martin will be greatly missed and wished her farewell. Board member Lynna Do join via Web Ex at 11:56am.

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

Board Member Beata Morcos stated it was a very emotional moment, as EO Heather Martin's retirement marks the end of an era., She thanked Ms. Martin for being such an amazing person, with incredible work ethic.

Board member Sharon Pavlovich echoed the same sentiments and added her heartfelt wishes for Ms. Martin's next chapter.

Board Member, Denise Miller thanked Executive Officer Heather Martin for being integral in in the formation of the Board's foundation. Ms. Miller stated that Ms. Martin was steadfast, exemplary in protecting consumers and every stakeholder was better off for having Ms. Martin at the Board.

Additionally, Denise Miller thanked DCA for the experience and privilege to serve the Governor and the consumer as a Board member. She also thanked CBOT SSM I Jody Quesada Novey and her staff for the solid foundation and experience gained during her service that began in 2013.

Board Member, Lynna Do, stated her appreciation for Executive Officer, Heather Martin and the help, direction and support she provided over the last four years. She wished Ms. Martin well in her new chapter.

Board Member, Hector Cabrera, thanked Executive Officer, Heather Martin for her incredible support, patience. He also thanked Ms. Martin for her intellect and board knowledge, as she will leave a very strong legacy.

Executive Officer, Heather Martin thanked everyone very much for all their kind words and well wishes. She stated that the California Board of Occupational Therapy had 6,000 licensees when she started at the Board and in comparison, has grown to 20,000+. The profession and the Board have always been a priority for her. She further stated that the current Board and all previous Board members contributed to a strong foundation for CBOT.

Ms. Martin, honored Sharon Pavlovich and Denise Miller for their many years of service with a Resolution supported by DCA's Director's office.

Board Member, Sharon Pavlovich said, "it takes a village to make this work." She thanked Board staff for the exquisite experience and stated that it would be a memorable part of her career. She also thanked, DCA and the Governor for allowing her to serve the profession and the State of California.

Board President, Richard Bookwalter, thanked Board Members, Sharon Pavlovich and Denise Miller and Executive Officer, Heather Martin for their service, hard work, and dedication to the Board. He closed with the fact that they would be dearly missed.

Executive Officer Heather Martin thanked everyone again and stated she couldn't have done all of this without the staff as it was a team effort.

CONVENED CLOSED SESSION

The Board convened in closed session at 12:15 p.m.

RECONVENE IN OPEN SESSION

The Board reconvened in Open Session at 2:35 p.m.

ADJOURNMENT

The Board meeting adjourned at 2:35 p.m.

AGENDA ITEM 6

**REVIEW AND VOTE ON APPROVAL OF THE JANUARY 24, 2025,
BOARD MEETING MINUTES.**



**** DRAFT ****

BOARD MEETING MINUTES

January 24, 2025

Department of Consumer Affairs

Ruby Room

1747 North Market Blvd.

Sacramento, CA 95834

Board Members Present

Beata Morcos – Board President
Christine Wietlisbach – Board Vice President
Richard Bookwalter – Board Secretary
Lynna Do

Board Staff

Marc Mason – Executive Officer
Rachel Hutchinson - Manager
Jody Quesada-Novey - Manager
Austin Porter – Analyst
Helen Geoffroy – Board Attorney

Board Members Absent

Hector Cabrera

Friday, January 24, 2025

10:00 am – Board Meeting

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

The meeting was called to order at 10:00 a.m., roll was called by Board Secretary Richard Bookwalter and a quorum was established.

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

Board President Beata Morcos welcomed all present for the first CA Board of Occupational Therapy (Board) meeting of 2025. She thanked the Board and Board staff for their support and asked for a moment of silence to acknowledge the devastating fires in Southern California.

President Morcos welcomed newly appointed Executive Officer Marc Mason and expressed her excitement to welcome him to the team.

Executive Officer Marc Mason stated that he was happy to work for the Board, glad for the staff at the Board and looked forward to the future.

Vice President Christine Wietlisbach welcomed Ms. Morcos as the new Board President and thanked her for the hours of hard work she contributed during her first few weeks in office.

Secretary Richard Bookwalter welcomed the 2025 Board leadership team and committed his support through the transition.

Lynna Do stated her appreciation for the Board and Board staff.

3. Public Comment for Items Not on the Agenda.

There was no public comment.

4. **STRATEGIC PLANNING SESSION**

A. Strategic Planning Overview – Department of Consumer Affairs, SOLID Training and Planning Solutions.

1. Introduction and Strategic Plan Overview
2. Strengths, Weaknesses, Opportunities, and Threats Analysis
3. Environmental Scan Review

B. Development of Strategic Objectives

C. Overview of Process for Finalizing Strategic Plan for Adoption by the Board

D. Recommendations for Agenda Items for Future Board Meetings. 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)]

Trisha St. Clair, Strategic Planner and Elizabeth Coronel, Planning Manager, with the Department of Consumer Affairs' Solid group, introduced themselves. Ms. St. Clair and Ms. Coronel advised the Board members and Board staff of the planning session guidelines and expectations. Ms. St. Clair and Ms. Coronel guided the Board members and staff through the review of the Environmental Scan responses from stakeholders that correlated with the goal areas that would be discussed and addressed with an eye toward solving.

The goal areas were:

1. Licensing
2. Enforcement
3. Outreach and Communication
4. Laws and Regulations
5. Organization and Administration Effectiveness

CLOSED SESSION

The Board convened in Closed Session at approximately 3:00 p.m.

ADJOURNMENT

The Board re-convened in Open Session in order to immediately adjourn the meeting at approximately 3:30 p.m.

AGENDA ITEM 7

**REVIEW AND VOTE ON APPROVAL OF THE FEBRUARY 14,
2025, BOARD MEETING MINUTES.**



**** DRAFT ****

TELECONFERENCE BOARD MEETING MINUTES

February 14, 2025

Board Members Present

Beata Morcos – Board President
Christine Wietlisbach – Board Vice President
Richard Bookwalter – Board Secretary
Lynna Do
Hector Cabrera

Board Staff

Marc Mason – Executive Officer
Rachel Hutchinson - Manager
Jody Quesada-Novey - Manager
Austin Porter – Analyst
Helen Geoffroy – Board Attorney

Friday, February 14, 2025

12:45 pm - Board Meeting

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

The meeting was called to order at 12:47 p.m., roll was called by Board Secretary Richard Bookwalter and a quorum was established. All offered teleconference sites were verified to have a Board member or staff present. The Peninsula Center Library hosted President Beata Morcos as well as Board member Hector Cabrera. All sites reported that no members of the public were present.

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

Board President Beata Morcos welcomed all in attendance, thanked them for their willingness to attend the meeting on short notice and wished everyone a happy Valentine's Day. President Morcos explained that the impetus for the meeting was to discuss the Executive Officer recruitment that was needed due to the resignation of Marc Mason.

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

Hector Cabrera announced that a student who attended a previous Board meeting was accepted to Keck School of Medicine at the University of Southern California to study occupational therapy.

The Board members extended their congratulations.

4. Public Comment for Items Not on the Agenda.

Please note: The Board may not discuss or take action on this agenda item except to decide whether to place the matter on the agenda of a future meeting. [Government Code Sections 11125 and 11125.7(a)]

There were no public comments. All teleconference locations were polled for attendance and there were no public attendees.

5. Executive Officer Recruitment and Selection Process

- a. Presentation from DCA, Office of Human Resources on Executive Officer Recruitment and Selection Process.
- b. Discussion and Possible Action on Process for Recruitment and Selection of an Executive Officer.
- c. Review and Possible Action on Revised Executive Officer Duty Statement and Recruitment Announcement.
- d. Discussion and Possible Action on Appointment of an Executive Officer Search Committee.

President Beata Morcos welcomed Catherine Bachiller, Recruitment Specialist from the Department of Consumer Affairs' Human Resources office.

Ms. Bachiller gave a verbal overview of the Executive Officer (EO) recruitment and selection process as outlined in sections a – d above.

The Board members had no changes to the EO duty statement nor recruitment announcement. The board members agreed on posting the vacancy as soon as possible and that the selection committee would consist of President Morcos and Vice President Wietlisbach.

There were no public comments.

CONVENE CLOSED SESSION

The Board convened in closed session at 12:58 p.m.

RECONVENE IN OPEN SESSION

The Board reconvened in open session at 1:25 p.m.

MEETING ADJOURNMENT.

The meeting adjourned at 1:26 p.m.

AGENDA ITEM 8

**REVIEW AND VOTE ON APPROVAL OF THE MARCH 6 – 7, 2025,
BOARD MEETING MINUTES.**



****DRAFT****

BOARD MEETING MINUTES

March 6 - 7, 2025

**Keck Graduate Institute
School of Health Sciences
Sheldon M Schuster Campus Center
Meeting Room – Building 517, Founders Room 165
535 Claremont Drive, Claremont, CA 91711**

Board Members Present

Beata Morcos – Board President
Christine Wietlisbach – Board Vice President
Richard Bookwalter – Board Secretary
Hector Cabrera
Lynna Do

Board Staff Present

Austin Porter – Interim Executive Officer
Jody Quesada Novey - Manager
Helen Geoffroy – Board Attorney
Karina Clark - Analyst

**Thursday, March 6, 2025
9:30 am - Board Meeting**

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

The meeting was called to order at 9:31 a.m. Secretary Richard Bookwalter called roll and a quorum was established.

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

Board President Beata Morcos thanked Keck Graduate Institute (KGI), School of Health Sciences, for hosting the Board meeting. Ms. Morcos welcomed and thanked the Board's Interim Executive Officer (EO), Austin Porter and Board staff.

Interim EO Austin Porter thanked President Morcos and the Board members for entrusting him with Board staff operations.

There were no Board member remarks.
There were no public comments.

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

Lynna Do thanked the staff at KGI for such a warm welcome.

Hector Cabrera thanked Interim EO Austin Porter for being proactive and supportive during the transition.

There were no other Board member remarks.

4. Public Comment for Items Not on the Agenda.

KGI, Occupational Therapy Program Director Vikas Sharma, PhD, welcomed Board members and staff to KGI for the Board meeting. Dr. Sharma thanked the Board members for all their hard work, and for being such an important entity in helping the consumers as well as the licensees. He stated there are faculty and students attending this meeting, who will be learning side by side with Board members.

Assistant Professor Kelly Auld-Wright OT/L introduced herself and thanked Board members for choosing Keck Graduate Institute.

Assistant Professor Ana Sanchez OT/L introduced herself and thanked Board members for choosing Keck Graduate Institute.

Assistant Professor and Capstone Coordinator Hanalynn Hunt, OTD, OTR/L, CBIS introduced herself and thanked Board members for choosing Keck Graduate Institute. She expressed her excitement to witness the Board's process.

Capstone Student Viviana Avila introduced herself and thanked the Board members for choosing Keck Graduate Institute.

Student Pearl Kim introduced herself and welcomed the Board members,

Director of Operations & Academic Administrative Specialist Jennifer Jiang introduced herself and thanked the Board members for choosing Keck Graduate Institute.

Ada Boone Hoerl, Sacramento City College Occupational Therapy Assistant Program Coordinator thanked the Board members for all their important work and the ability to join this meeting via WebEx.

Board President Beata Morcos thanked Ada Boone Hoerl for joining the Board meeting.

There were no other Board member remarks.

There were no other public comments.

5. Review and vote on approval of November 14-15, 2024, Board meeting minutes.

Board President, Beata Morcos requested that use of "committee chair" be removed from agenda item #9, Report from the EO Selection Committee, because there is not a chairperson of the EO Selection committee.

Board member Richard Bookwalter requested a correction to agenda item #8, paragraph 8 to read in part, "...the consumer may or may not benefit from the practitioner being recognized as a First Responder."

- Richard Bookwalter moved to accept the November 14-15, 2024, Board meeting minutes with discussed changes to items #8 and #9
- Christine Wietlisbach seconded the motion.

Board Member Vote

Beata Morcos	Yes
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Hector Cabrera	Yes
Lynna Do	Abstain

There were no Board member remarks.
There were no public comments.

The motion carried.

6. Report from the Administrative Committee.

Board President Beata Morcos stated that the Administrative committee consisted of the EO, Board President, and Vice President and there was no legal requirement for noticing the meeting or transcribing minutes.

Three meetings took place in the last two months. The first meeting took place in January, as newly hired EO, Marc Mason, gave notice of vacating the position and the Administrative Committee met to discuss his replacement.

Two meetings took place in February, one to officially process Marc Mason's resignation and the second meeting was to appoint Interim Executive Officer Austin Porter.

During the second meeting, Strategic Planning was discussed along with the constrained budget. Interim EO Austin Porter met with the Budget office several times to discuss CBOT's budget and collaborate on cost savings for the remainder of the fiscal year.

There were no Board member remarks.
There were no public comments.

7. Report from the Ad Hoc Committee on Disaster Preparedness and Response.

Mr. Bookwalter requested approval of the Disaster Preparedness and Response (DPR) Committee meeting minutes from April 19, 2024.

- Richard Bookwalter moved to approve the minutes.
- Christine Wietlisbach seconded the motion.

There were no Board member remarks.

There were no public comments.

Board Member Vote

Beata Morcos	Yes
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Hector Cabrera	Yes
Lynna Do	Yes

The motion carried

Data from the survey on Disaster Preparedness was compiled and presented to committee members at the January 15, 2025, meeting. The survey questions were geared toward understanding what licensees are doing to prepare their patients for a disaster and what the workplaces are offering as training.

Mr. Bookwalter mentioned there were two resource and information webpages pertaining to Disaster Preparedness and Response available on CBOT's website. One was for consumers and the other one for practitioners. During the committee meeting on January 15, 2025, there was a robust discussion on Occupational Therapists (OTs) being recognized as First Responders and if and how that can be accomplished. Guest Emily Balog, PhD, OTR/L, who is a professor at Rutgers University, was able to provide committee members with the different definitions of a First Responder from several government agencies.

A letter outlining support for OT practitioners to be recognized as first responders was received from the President of the Occupational Therapy Association of California (OTAC), Samia Rafeedie.

The discussion of the OT profession being recognized as First Responders was discussed at previous Board meetings with the intention of obtaining the status and benefits. Mr. Bookwalter offered his research that stated the First Responders are law enforcement, fire and EMTs, as they are the ones that respond in case of an emergency. Occupational Therapy would be secondary care to what is offered by the aforementioned professions.

Vice President Christine Wietlisbach asked how Emily Balog, PhD, OTR/L felt about the OT profession being a First Responder. Mr. Bookwalter stated she expressed some doubt, because current definitions from Homeland Security and other government agency websites do not identify OT practitioners as First or Emergency Responders.

Board member Lynna Do added that OT practitioners would be beneficial during disasters due to their education and training. Vice President Christine Wietlisbach agreed that OTs are trained in transfers, which would make it easier for an OT to assist EMT or other responders with movement.

Public Comment

KGI Assistant Professor Kelly Auld-Wright stated that with her past experience at Ranchos Amigos Hospital, during COVID, OT practitioners were considered Disaster Service Workers by L.A County. They assisted with transfers and medication intake, similar to the roll of a CNA. Some of her coworkers were also sent out to the nursing unit for about 2-3 months. During COVID, OTs were afforded the same benefits as any other first responder, but that is not the case today.

KGI OT Program Director Vikas Sharma, PhD stated that while he worked in a Skilled Nursing Facility, during an emergency, OT's worked side by side with nurses, doctors and law enforcement to ensure patients were safe. He expressed that this would be a long process and thanked the Board for looking into it.

Sacramento City College OTA Program Director Ada Boone Hoerl stated that she was a Red Cross instructor, and they offered several trainings on Disaster Preparedness and Relief. She stated she is not stuck on the word First Responder for the OT profession, but instead to look at language for the profession to participate in Disaster Relief. She suggested that the Board could identify the OT profession as Disaster Support, which would define and bring status to the profession.

Mr. Bookwalter added, as per Google definition, nurses are not even considered First Responders which technically means that OT practitioners would also not be considered First Responders. Mr. Bookwalter asked the Board if they wished to pursue attempting to have OT practitioners recognized as First Responders or Disaster Support. Additionally, he asked if the committee wished to create and send another survey in light of the LA fires and the small response to the first survey.

Board members Hector Cabrera and Lynna Do agreed to have another survey sent to practitioners referencing the LA fires and focused on the role OT practitioners played and whether they felt prepared to assist in the disaster. The results of the survey can help the Board decide if they wish to continue pursuing recognition for OT practitioners related to Disasters.

Survey questions would be discussed at the upcoming DPR Committee meeting, scheduled for April 16, 2025.

Board President, Beata Morcos, requested that the DPR Committee research the procedure on how to become recognized as a First Responder and/or Disaster Responder.

Ada Boone Hoerl was appointed by President Morcos as a DPR Committee member. Ms. Boone Hoerl accepted.

Public Comment

OTAC Treasurer Candace Chapman, OTD, OTR/L introduced herself and thanked the Board and DPR Committee members for working toward achieving First Responder recognition.

There were no additional Board member remarks.

There were no additional public comments.

8. Update on the Board-Approved Practice Reviewer Application Changes.

Interim EO Austin Porter reviewed the updates that were made to the Practice Reviewer Application as a result of a Board vote.

1. Occupational Therapy Assistants were added to Practice Reviewer application as eligible reviewers
2. Experience length was updated to match CBOT's website, which is 10 years.

Public Comment

Ada Boone Hoerl, asked for clarification on the term "experience" from the Board.

Interim EO, Austin Porter explained the term "experience" means 10 years of experience in the profession in general. The application further states, with seven years of recent experience in the area of expertise of which they will be reviewing cases.

There were no additional Board member remarks.

There were no public comments.

9. Discussion and Possible Action on the Sunset Review process and possible Sunset Committee Member appointment.

Interim EO Austin Porter started by letting Board members know the last Sunset Review Committee minutes from 2021 were included, to provide information and a general idea of what type of information and reports will have to be produced. This information was reference material for those Board members that may not have been part of the last Sunset Review. Mr. Porter further explained the Sunset report is due every four years, unless an extension is approved. The EO and at least the Board President go before the California Legislature to provide an update on the Board's activities, processes, staffing, meetings, and to address any issues the legislature may have found in the prior report. The goal is to extend the authority of the Board for another four years. The Sunset report is due at the end of 2025 and there will be a hearing in early 2026.

Board member Richard Bookwalter shared his experience at the previous Sunset Legislative hearing, which was a mix of committee members from the Legislature and the Senate, all from the business of professions subcommittees. They asked several questions about budget, managing of funds, and if the Board was successful at implementing the tasks assigned by the Legislature at the previous Sunset review. There were 25 questions included in the report, and five questions that were not expected.

President Morcos appointed the following as Sunset Committee Members:

- Beata Morcos, President
- Christine Wietlisbach, Vice President
- Richard Bookwalter, Secretary

There were no additional Board member remarks.

There were no additional public comments.

CONVENED CLOSED SESSION

The Board convened in closed session at 12:26 pm.

ADJOURNMENT

The Board Meeting convened in open session and immediately adjourned at 12:49pm.

BOARD MEETING MINUTES

March 6 – 7, 2025

**Keck Graduate Institute
School of Health Sciences
Sheldon M Schuster Campus Center
Meeting Room – Building 517, Founders Room 165
535 Claremont Drive, Claremont, CA 91711**

Board Members Present

Beata Morcos – Board President
Christine Wietlisbach – Board Vice President
Richard Bookwalter – Board Secretary
Hector Cabrera
Lynna Do

Board Staff Present

Austin Porter – Interim Executive Officer
Jody Quesada Novey - Manager
Helen Geoffroy – Board Attorney
Karina Clark - Analyst

Friday, March 7, 2025

9:30 am - Board Meeting

10. Call to order, Roll Call, Establishment of Quorum

The meeting was called to order at 9:37 a.m. Secretary Richard Bookwalter called roll and a quorum was established.

11. President's Remarks – Informational Only; No Board Action to be Taken.

Board President Beata Morcos thanked the staff and faculty at Keck Graduate Institute, School of Health Sciences for hosting the Board meeting and offering a warm welcome. Ms. Morcos also thanked Keck Graduate Institute President Dr. Mohamed Abousalem, Provost Megan Prosser, Program Director Dr. Vikas Sharma, OTD, OTR/L, and Administrative Support Specialist Jennifer M. Jiang.

12. Board Member Remarks – Information Only; No Board Action to be Taken.

There were no additional Board member remarks.

13. Public Comment for Items not On the Agenda.

OTAC President Samia Rafeedie asked for a status update on the approved changes to the California Code of Regulations (CCR), Title 16, Division 39, Section 4181 Supervision Parameters, and in particular the motion that passed at the November 13-14, 2024, Board meeting that would strike OTAs from being included in the final number of people that could be supervised at any one time by an OT. Supervision of OTAs was already outlined in statute and the vote would make effective that OTA supervision would be kept separate from changes made to CCR Section 4181.

Christine Wietlisbach, Board Vice President, replied that the comment could not be discussed because it was not noticed on the agenda. Ms. Wietlisbach advised that an overview may be given during the Executive Officer's report, but the Board could not address it otherwise. President Morcos and Vice President Wietlisbach thanked Ms. Rafeedie for the OTAC's support.

Public Comment

Sacramento City College Occupational Therapy Assistant Program Coordinator Ada Boone Hoerl thanked the Board for the collaborative discussion between OTAC and the Board on supervision parameters. She served on the Supervision Standards committee and it was the intention of the committee to have OTA's removed from the list, as they were already licensed. She thanked the American Occupational Therapy Association (AOTA) and OTAC for the continued follow up.

Kristen Neville, AOTA Manager of State of Affairs, thanked the Board for allowing her the opportunity to attend virtually. She joined the meeting to support Samia Rafeedie, OTAC President. Ms. Neville thanked the Board and stated that she will await the regulatory update.

There were no other public comments.

14. Discussion and possible action on requiring professional development units pertaining to the Board's laws and regulations and possible implementation.

President Beata Morcos gave an overview of the list of states that require a jurisprudence examination or questionnaire.

Lynna Do stated that she would be in favor of the jurisprudence examination or questionnaire being a requirement of continuing education, as opposed to a required exam during licensure.

Vice President Christine Wietlisbach stated with her past experience as a contractor for enforcement case review, she noticed that a lot of practitioners do not understand the law. Having this requirement would be beneficial for the practitioners in staying current with the laws and regulations of the profession. Ms. Wietlisbach supported jurisprudence education because it would be more cost effective.

Secretary Richard Bookwalter supported jurisprudence as continuing education or an attestation to reading the current laws becoming requirement.

Helen Geoffrey, DCA Attorney, stated that if there is not a required continuing education course being offered for jurisprudence, an attestation can be developed that included a summary of the laws and required a signature.

Ms. Wietlisbach stated that she was not aware that any continuing education course on laws or regulations for practitioners exists. Interim EO Austin Porter stated he conducted research for a course that would cover California law pertaining to occupational therapy, and he was unable to locate one. If the Board was to adopt an attestation or continuing education course requirement, a regulatory package would need to be approved.

Public Comment

Samia Rafeedie stated she would love to partner with the Board to develop an exam or a course for a continuing education requirement on the Board's laws. Ms. Rafeedie stated that OTAC has law experts across the State with higher education. OTAC would be able to create the continuing education examination/course in person or online, as decided by the Board.

Dr. Vikas Sharma stated he also supported the Board in their decision to implement a jurisprudence exam in the future as part of continuing education. He asked for clarity on the specific laws that may need to be covered by the continuing education instructors.

Ada Boone Hoerl, Program Director of Occupational Therapy Assistant Program, Sacramento City College thanked the Board and OTAC for wanting to collaborate on the development and implementation of this exam. She also supported the Board making this a continuing education requirement. Continuing education will help practitioners understand the current law and keep it in the forefront of their minds, as opposed to a one-time examination. She stated she would be willing to assist with writing the exam and teaching the learning module.

Christine Wietlisbach, Board Vice President voiced that she would not be in favor of an attestation because it would not require the needed review.

Board member Lynna Do stated she would be in favor of an examination for continuing education, as law changes constantly. In the meantime, an attestation option can be available to licensees until the examination is complete. Austin Porter recalled the Board currently has a regulation package for additional requirements on continuing education.

The Board's Regulations Attorney, Elizabeth Dietzen-Olsen, stated this topic was for discussion only and cannot be voted on during the current meeting.

Richard Bookwalter stated he is leaning towards having the option of an ethics or jurisprudence class like Ohio Regulations:

*"Ohio Administrative Code
Rule 4755:1-3-01 Continuing Education*

(5) License holders shall complete at least one contact hour of ethics, jurisprudence, or cultural competence education per renewal cycle. The one-hour ethics, jurisprudence, or cultural competence requirement may be fulfilled by completing an acceptable activity...."

Adding another required continuing education course would be burdensome for licensees, as there are current regulations on the type of PDUs that are acceptable when renewing. He further stated the more complicated the regulations are the harder it will be for licensees to comply.

Helen Geoffrey, DCA Attorney stated that the culturally relevant practice, socio-cultural factors, working with diverse populations and/or bias requirement may be required by statute.

Mr. Bookwalter and Ms. Wietlisbach expressed support to have a California law (jurisprudence) requirement replace or coexist with the ethics requirement. Staff will research the appropriate language to add to current continuing education regulation.

Public Comment

Samia Rafeedie, President, Occupational Therapy Association of California, asked for clarification on the current regulation package proposed language:

(3) One course shall pertain to California Business and Professions Code Division 2 Chapter 5.6 Occupational Therapy [2570 – 2572] and shall pertain to California code of Regulations Title 16, Division 39 [4100 – 4187].

Richard Bookwalter, Board Secretary, clarified that the language presented in double underline is a proposed language concept for Board discussion and does not currently exist.

Helen Geoffrey, DCA Attorney stated that if the above language is approved, the package can be changed to include the continuing education requirement. The soonest it could go into effect is July 2026.

No further Board discussion.
No public comment.

15. Regulatory update.

Interim EO Austin Porter presented a summary of regulatory packages the Board had approved language for and are in process. Mr. Porter reported that the regulatory package that amended sections 4110, Applications, 4111, Place of filing, 4112, Review of Application and 4114, Abandonment of Application was currently published on CBOT's website for comment and would go back to the Director of DCA after the 45-day comment period was completed, which is on April 1st, 2025. If no changes need to be made due to comment, the Director's office will send the package to the Office of Administrative Law (OAL) for final approval, which can take up to 30 days.

President Beata Morcos directed staff to give priority to packages that included language approved by the Board in November 2024, specifically sections:

- 4151 Hand Therapy
- 4152 Physical Modalities
- 4153 Swallowing Assessment Evaluation, or Intervention
- 4180 & 4181 Definitions of Supervision Parameters

The first three sections referenced above are packages awaiting direction from the Practice Committee. Vice President Christine Wietlisbach stated that the committee is currently addressing each of the topics above and waiting to add more private practice OTs to the committee to provide input regarding patient record retention requirements when a business is closed/sold/inherited or has a change of ownership; or if practitioner is no longer in private practice.

No further Board comment.
No public comment.

16. Executive Officer's Report.

a) Administrative Update, including information on the Board's budget, personnel, BreEZe, and Fee Study Status.

Mr. Porter reported that year to date revenue was at \$2.2 million, and expenditures reflect \$2.0 million. The Fund Condition for fiscal month seven showed a \$118,000 adjustment, which resulted in an increase in months in reserve. Even with that budget adjustment, the DCA budget office did not approve the fee study required for the necessary fee increases. Mr. Porter is currently working with the DCA budget office to assist in completing an alternative budget analysis. Lastly, the Board anticipates additional funding from the requested AG and OAH augmentations shown in the budget.

BreEZe updates are as follows:

1. The Board's pocket license printer is out of order resulting in the application to purchase a pocket license being unavailable online.

2. Due to recently Los Angeles fires, there is a deferment of fees for all licensees residing within impacted zip codes until June 30th, 2025.

Mr. Porter announced that there were no Board staff vacancies, Ms. Martin's successor Marc Mason chose to leave the Board, and he (Mr. Porter) was appointed Interim Executive Officer on February 14, 2025.

Mr. Porter reviewed the Licensing and Enforcement department data provided in the meeting materials and there were no questions.

Public Comment

Kristen Neville, Manager of State Affairs, AOTA, clarified that the AOTA will allow the Board to publish relevant parts of their Practice Framework document.

Helen Geoffrey, DCA Attorney advised the Board if only a portion of AOTA's Occupational Therapy Practice Framework will need to be used and posted on CBOT's website, it will have to be voted on by all Board members prior to posting.

No further Board discussion.
No public comment.

17. Legislative update

Interim Executive Officer Austin Porter started by referring to the materials included in the packet, beginning with a summary of legislative updates that may have some impact on Occupational Therapy as a profession. The list was compiled by Board staff to present at this Board meeting for Board members to review and decide if the current Legislative updates are relevant to the profession. The full text of each Bill is also in the packet for review.

Board Secretary Richard Bookwalter, who has been part of the Legislative Committee stated that the committee has not met, but he has reviewed the list of Legislative updates, and the Board can decide if they want to refer them to the Committee after reviewing them.

Summary of Legislative Bills:

- **AB 277 – Behavioral health centers, facilities, and programs: background checks.**

The Board will watch Bill AB 277, as it may apply to Occupational Therapy practitioners working in Behavioral Health Centers.

- **AB 346 - In-home supportive services: licensed health care professional certification.**

The Board will watch Bill AB 346, as occupational therapy is IHSS approved, to provide in-home services and it may change.

- **AB 348 – Full-service partnerships.**

The Board will watch Bill AB 348, as occupational therapy is one of the supportive services provided to severe Mental Health patients. This bill will reduce the eligibility mandate from the State.

- **AB 489, Bonta – Health care professions: deceptive terms of letters: artificial intelligence (AI).**

The Board will watch Bill AB 489, as a Regulation will need to be written to protect Occupational Therapy, health care, and healing arts, if it passes. The Department of Consumer Affairs (DCA) is aware of this bill, as it has already sent notice to California Board of Occupational Therapy to request a fiscal impact analysis, as to what costs will be added to the Board to regulate and enforce the language of this bill.

- **Bill AB 667, Solache – Professions and vocations: license examinations: Interpreters.**

The Board will watch Bill AB 667, because in the future a continuing education examination may be required of licensees, and it may impact how the Board proceeds.

- **Bill AB 742, Elhawary – Department of Consumer Affairs: licensing applicants who are descendant of slaves.**

The Board will watch Bill AB 742, as this will require the California Board of Occupational Therapy to expedite licenses for descendants of slaves. Bill AB 742 did not pass last year but is up for hearing on March 21, 2025.

- **Bill AB 951, Ta – Health care coverage; behavioral diagnosis.**

The Board will watch Bill AB 951. Page 3, lines 3-6 of Bill AB 956 state:

This will affect Occupational Therapy re-diagnoses to continue to maintain coverage for health treatment for pervasive developmental disorder or autism.

Public Comment

Candace Chapman OTD, OTR/L thanked Board Secretary Richard Bookwalter for speaking on both sides of this issue, as there is always the potential for fraud. This is such a big necessity for families of children with autism to continue to get service.

There were no Board member remarks.
There were no public comments.

- **Bill AB 1009, Rubio – Teacher credentialing: administrative services credential: occupational and physical therapists.**

This bill is almost identical to the one submitted to the legislature in 2024, which was sponsored by OTAC and supported by the Board. The 2024 bill did not pass.

- Christine Wietlisbach moved to direct staff to send a letter in support of AB 1009.
- Richard Bookwalter second.

There were no Board member remarks.

Public Comment

Candace Chapman thanked the Board for their support on Bill AB 1009.

Board Member Vote

Beata Morcos	Yes
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Hector Cabrera	Yes
Lynna Do	Yes

The motion carried.

The Board would continue to support Bill AB 1009 and staff will submit a letter of support to the author.

- **Bill SB 641, Ashby – Department of Consumer Affairs and Department of Real Estate: states of emergency: waivers and exemptions.**

The Board agreed to watch Bill SB 641, as it exempts Occupational Therapists from having to pay licensing fees and submit address changes during a disaster.

Helen Geoffrey, DCA Attorney, explained bill SB 641, section 7, allows victims of disaster-stricken areas, 90 days following an emergency to make changes. She further stated, DCA legal is currently looking at this bill and is unsure if DCA has sponsored this bill. Currently DCA's Legal office process pertaining to a declaration of emergency is to discover what and whom may be impacted and ask the Governor's office to waive the requirements or create an emergency order. SB 641 is supposed to aid in the process.

Vice President Wietlisbach suggested the Board wait until they know if DCA is in support of Bill AB 641.

CBOT staff was asked to reach out to DCA to find out what their stance is on Bill AB 641.

- **Bill SB 813, McNerney – Increase client record maintenance period.**

The Board agreed to watch Bill SB 813 in light of the information provided in Samia Rafeedie's comment below.

Public Comment

Samia Rafeedie, OTAC President, stated that she reached out to OTAC's lobbyist, who explained the bill was presented as a "spot bill" which meant it would be amended at some point. On March 3, 2025, the OTAC lobbyist, received communication from Senator McNerney's office, stating Bill SB 813 had been amended and no longer included the Occupational Therapy profession.

Samia Rafeedie, stated she would keep CBOT staff updated with any information she received from her lobbying staff.

No further Board discussion.
No further public comments.

18. Review and vote on approval of the Board's 2025-2030 Strategic Plan.

Board President, Beata Morcos reported that the California Board of Occupational Therapy chose their Strategic Plan to be completed every four years. This was an opportunity for the Board to come up with varied areas of improvement, and how those improvements would be implemented within the four-year window. The Strategic Planning was broken into the following sections:

1. Licensing
2. Enforcement
3. Outreach and Communication
4. Laws and Regulations
5. Organization and Administrative

The DCA SOLID team individually interviewed every Board member, and several staff members. There was also a full day session where the items in the survey were discussed and expanded upon in order to be able to formulate a plan to address. A survey was sent to approximately 1,000 people, there were seven official responses. The answers and concerns from interviews and surveys were compiled by SOLID and put into the Strategic Plan document.

President Morcos asked the Board members if there were any questions or concerns about goals discussed during the Strategic Planning. All Board members agreed the document was correct.

There were no additional Board member remarks.

Public Comment

Dr. Vikas Sharma asked for clarification of what the new law and ethics exam in Strategic Plan goal 1.4 would be required to entail.

Board Vice President, Christine Wietlisbach explained that the current issue was that when the Board is hearing enforcement cases, licensees will respond with the defense of “I was never taught that”. Requiring an ethics exam or class, will deem that response null and void.

Candace Chapman OTD, OTR/L, OTAC Treasurer thanked the Board for the effort in considering law and ethics for continuing education. She is also a professor at USC and Academic Field Coordinator, and she often hears from students and licensees, that they did not learn the law and ethics in their program. She appreciated the additional measures that made it possible for licensees and the public to be able to have access to additional resources.

Ada Boone-Hoerl, stated that as an educator and Program Director, she understood students saying “I didn’t learn that” even though it is part of their curriculum in school. She thanked the Board for considering law and ethics as a requirement, as most students don’t do optional work. And making it a requirement for licensees, will keep it foremost in their mind.

- Christine Wietlisbach moved to approve Strategic Plan.
- Lynna Do seconded the motion.

There were no Board member remarks.
There were no public comments.

Board Member Vote

Beata Morcos	Yes
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Hector Cabrera	Yes
Lynna Do	Yes

The motion carried

ADJOURNMENT

The Board meeting adjourned at 11:30 a.m.

AGENDA ITEM 10

REPORT FROM THE AD HOC DISASTER PREPAREDNESS AND RESPONSE COMMITTEE.

INCLUDES THE FOLLOWING:

- 10.1 HIGHLIGHTS FROM THE APRIL 16, 2025, AD HOC DISASTER PREPAREDNESS AND
RESPONSE COMMITTEE MEETING.



AD HOC DISASTER PREPAREDNESS AND RESPONSE COMMITTEE HIGHLIGHTS

April 16, 2025

DRAFT

Committee Members Present

Richard Bookwalter, OT, Board Member/Chair
Hector Cabrera, Board Member
Mary Evert, OT
Ada Boone-Hoerl, OT

Board Staff Present

Austin Porter, Interim Executive Officer
Jody Quesada Novey, Manager
Karina Clark, Analyst

Wednesday, April 16, 2025

9:00 am – Committee Meeting

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

The meeting was called to order at 9:34 am, roll was called, and a quorum was established.

2. Committee Chair's Opening Remarks.

Chair Richard Bookwalter expressed his gratitude that the committee was able to meet, and he welcomed Ada Boone-Hoerl to the committee.

Chair Bookwalter welcomed the public to introduce themselves.

Samia Rafeedie, President of Occupational Therapy Association of California, introduced herself and thanked the committee members for allowing her to join in the conversation.

3. Public Comment for Items Not on the Agenda.

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

4. Review and vote on approval of the January 15, 2025, committee meeting minutes.

- Mary Evert moved to approve the January 15, 2025, committee meeting minutes.
- Hector Cabrera seconded the motion.

There were no additional committee member remarks.

There was no public comment.

Committee Member Vote

Richard Bookwalter	Yes
Hector Cabrera	Yes
Mary Evert	Yes
Ada Boone-Hoerl	Yes

The motion carried.

5. Discussion and possible recommendation(s) to the Board on the development of an additional survey on Disaster Preparedness with a focus on the recent Southern California wildfires.

Chair Bookwalter said there was discussion during the last Committee meeting to send out a follow up survey, as there may be more participation considering the recent Southern California fires. There was a desire to filter out student responses and limit the survey to licensees only.

Discussion ensued regarding the recent survey (in agenda item #6 of the Committee's January 15, 2025, meeting), how or whether the questions could be improved, how an increase in number of respondents or additional questions could instruct the committee in making further recommendations to the Board, and the what the goal of a new survey should be.

- A shorter simpler survey was proposed as means of attracting more licensees' respondents. An open question: Whether less information from more people could be useful to the Board.
- A more detailed survey with follow-up questions was seen as likely to provide the Board with higher quality information but attract fewer licensee responses due to increased complexity and survey length. The aspiration for a higher response rate is one the main reasons for a new/repeat survey.
- Any survey with new questions would be subject to vetting and approval of by DCA and state government, with financial costs to the Board and extended timeframes for implementation. Repeating the same survey, could avoid further costs and be implemented quickly. The committee was undecided whether a larger number of responses to the same questions could inform any new recommendations to the Board.

The Committee reached a consensus that the primary purpose of a new survey would be to draw licensees' attention to the topic of disaster preparedness and response training and advocate for OT/OTA participation in disaster preparedness and response in their communities and workplaces. The survey was seen as a tool for advocacy as the primary goal, the Committee decided to recommend that the Board use means other than a Board initiated survey to support disaster

preparedness and response; namely, collaboration with the OT professional associations and advocacy groups, in a supportive role.

Samia Rafeedie, stated in agreement of OTAC and CBOT to collaborate on improving OT practitioner awareness and training around disaster preparedness and response, in the interest of the consumer. For example, OTAC, as a continuing education provider, could include programming at the annual conference around disaster preparedness and response, and collaborate with CBOT on future research and awareness efforts.

The following recommendations will be presented to the Board during June 2025 Board meeting:

- Consider a higher-level collaborative effort with OTAC to develop disaster preparedness and response content for conferences and continuing education events.
- Present Disaster Preparedness and Response information as a keynote speech at future OTAC conference.
- Collaborate with OTAC in a future survey with shorter questions, with an emphasis on licensees and current disasters in California. Include separate columns for students and registered therapists in future surveys.

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

6. Discussion on First Responder information and resources shared by Emily Balog, PhD, OTR/L.

Chair Richard Bookwalter, started by referring to the document with Emily Balog's, discussion points Committee discussing the role of occupational therapists as first responders in disaster preparedness and response. Some committee members advocate for OTs to be classified as first responders

Public Comment

Samia Rafeedie, OTAC's President, wrote a letter voicing OTAC's support on the efforts to recognize the OT profession as first/emergency responders.

Chair Bookwalter, expressed skepticism in recognizing the OT profession as first responders. Because other professions such as Nurses, Doctors, Certified Emergency Responder Team (CERT) members are not considered first responders.

Hector Cabrera asked what the role of an Occupational Therapist would be in a major disaster and suggested the role of the occupational therapist in an emergency should be defined.

Chair Bookwalter, agreed that the role of the Occupational Therapist in a disaster or emergency should be better defined, as this will help the public better understand their role.

Ada Boone-Hoerl, asked the if the term First Responder would have to be pursued, due to its clear definition on who fits into those roles. Because if this Committee is looking at consumer protection and working with OTAC to help support the related training once the role of the OT practitioner is defined is worth pursuing.

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

7. Discussion on scheduling time(s) for future meetings.

Chair Bookwalter suggested scheduling the next Disaster Preparedness and Response Committee meeting after the June Board meeting, to get clear direction from the Board what should be discussed next.

A doodle poll will be sent out to confirm a future committee meeting date.

Public Comment

There was no public comment.

8. New suggested agenda items for a future meeting.

No specific agenda or action items were discussed for the Ad Hoc Committee. General collaboration with OTAC and other interested parties on training, advocacy, and research around disaster preparedness and response could be assigned by the Board to committee or taken up by the Board later, at the discretion of the Board.

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

Meeting adjournment.

The meeting adjourned at 10:41 a.m.

AGENDA ITEM 11

REPORT FROM THE PRACTICE COMMITTEE.

INCLUDES THE FOLLOWING:

- 11.1 HIGHLIGHTS FROM THE APRIL 25, 2025, PRACTICE COMMITTEE MEETING.
- 11.2 LAWS AND REGULATIONS RELEVANT TO HAND THERAPY.
- 11.3 COMPARISON OF THE 2008 THROUGH 2025 ACCREDITATION COUNCIL FOR OCCUPATIONAL THERAPY EDUCATION (ACOTE) STANDARDS RELEVANT TO HAND THERAPY.
- 11.4 COMPLETE 2023 ACOTE STANDARDS (EFFECTIVE JULY OF 2025).

[HTTPS://ACOTEONLINE.ORG/DOWNLOAD/5856/?TMSTV=1706886053](https://acoteonline.org/download/5856/?TMSTV=1706886053)



**** DRAFT ****

PRACTICE COMMITTEE MEETING HIGHLIGHTS

April 25, 2025

Committee Members Present

Christine Wietlisbach (Chair) (Board Vice President)
Richard Bookwalter (Board Secretary)
Carlin Daley Reaume
Ernie Escovedo
Mary Kay Gallagher
Elizabeth Gomes
Diane Laszlo
Danielle Meglio
Jeanette Nakamura
Chi-Kwan Shea

Board Staff Present

Austin Porter, Interim Executive Officer
Jody Quesada Novey, Manager
Karina Clark, Analyst

Committee Members Absent

Lynne Andonian
Bob Candari
Heather Kitching

Friday, April 25, 2025

1:00 pm – Committee Meeting

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

The meeting was called to order at 1:06 pm, roll was called, and a quorum was established.

2. Chairperson opening remarks.

Chairperson Christine Wietlisbach welcomed all and advised that the majority, if not total discussion would relate to potentially recommending changing the training and education hours for Board approval in hand therapy.

3. Public Comment for Items Not on the Agenda.

There was no public comment for items not on the agenda.

4. Review and vote on approval of the October 11, 2024, committee meeting minutes.

- Heather Kitching moved to approve the August 2, 2024, committee meeting minutes with the proposed updates.
- Diane Laszlo seconded the motion.

Public Comment

There were no public comments.

Committee Member Vote

Lynne Andonian	Absent
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Bob Candari	Yes
Carlin Daley-Reaume	Absent
Lynna Do	Absent
Ernie Escovedo	Yes
Mary Kay Gallagher	Yes
Elizabeth Gomes	Yes
Heather Kitching	Yes
Diane Laszlo	Yes
Danielle Meglio	Yes
Jeanette Nakamura	Yes
Chi-Kwan Shea	Yes

The motion carried.

5. Consideration and possible recommendation to the Board on whether the education and training requirements for licensees demonstrating competence in the advanced practice area of hand therapy should be reduced.

Chair Wietlisbach welcomed ACOTE's Director of Accreditation Teresa Breninger and thanked her for making time in her busy schedule to attend the meeting.

Chair Wietlisbach explained that Ms. Breninger was invited so that she could speak to ACOTE's opinion on whether the Board's regulations on post professional education and training requirements for licensees demonstrating competence in hand therapy should be reduced based on the evolution and update of ACOTE's education requirements.

Ms. Breninger agreed with the Practice committee's opinion that **BPC 2570.3 (e)** areas 1-5 are being met during an accredited OT program. Ms. Breninger also agreed that area 6. *Surgical procedures of the upper extremity and their postoperative course* is not being met.

- (1) *Anatomy of the upper extremity and how it is altered by pathology.*
- (2) *Histology as it relates to tissue healing and the effects of immobilization and mobilization on connective tissue.*
- (3) *Muscle, sensory, vascular, and connective tissue physiology.*
- (4) *Kinesiology of the upper extremity, such as biomechanical principles of pulleys, intrinsic and extrinsic muscle function, internal forces of muscles, and the effects of external forces.*
- (5) *The effects of temperature and electrical currents on nerve and connective tissue.*
- (6) *Surgical procedures of the upper extremity and their postoperative course.*

Ms. Breninger encouraged the committee and/or Board to write a letter to the ACOTE Educational Standards Review Committee to request that *area 6. Surgical procedures of the upper extremity and their postoperative course* be added to the required curriculum in the future.

Following a lengthy discussion pertaining to the modification of the Board's regulations surrounding the required areas of education and the correlating training hours, the committee members agreed that Chair Wietlisbach would recommend reduction of the education and training hours to the Board.

It was agreed that Interim Executive Officer Austin Porter would work with Board counsel to formulate proper regulatory language using the concepts provided in the next two motions.

- Richard Bookwalter moved to recommend to the Board modifications to CCR Section 4151 to demonstrate that subject areas 1-5 pertaining to hand therapy are now covered through ACOTE standards. Additionally subject area 6. *Surgical procedures of the upper extremity and their postoperative course* is not covered. The required contact hours should be reduced from 45 to 8 hours which will focus on subject area 6. The recommendation would also include a critical "on or after" date that coincides with the effective date of ACOTE guidelines.
- Carlin Daley Reaume seconded the motion.

Public Comment

Ada Boone Hoerl offered that she did the math while listening and it would equal 7.5 hours.

Committee Member Vote

Lynne Andonian	Absent
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Bob Candari	Yes
Carlin Daley-Reaume	Absent
Lynna Do	Absent
Ernie Escovedo	Yes
Mary Kay Gallagher	Yes
Elizabeth Gomes	Yes
Heather Kitching	Yes
Diane Laszlo	Yes
Danielle Meglio	Yes
Jeanette Nakamura	Yes
Chi-Kwan Shea	Yes

The motion carried.

- Carlin Daley Reaume moved to recommend reducing the required on-the-job, supervised training hours for Advanced Practice approval in Hand Therapy for all licensed Occupational Therapists from 480 hours to 80 hours.
- Chi-Kwan Shea seconded the motion.

Public Comment

There was no public comment.

Committee Member Vote

Lynne Andonian	Absent
Christine Wietlisbach	Yes
Richard Bookwalter	Yes
Bob Candari	Yes
Carlin Daley-Reaume	Absent
Lynna Do	Absent
Ernie Escovedo	Yes
Mary Kay Gallagher	Yes
Elizabeth Gomes	Yes
Heather Kitching	Yes
Diane Laszlo	Yes
Danielle Meglio	Yes
Jeanette Nakamura	Yes
Chi-Kwan Shea	Yes

The motion carried.

6. Consideration and possible recommendation to the Board on whether the education and training requirements for licensees demonstrating competence in the advanced practice area of swallowing assessment, evaluation, or intervention should be reduced.

Chair Wietlisbach stated that due to the length and depth of the conversation regarding hand therapy, that discussion and possible recommendation on swallowing assessment, evaluation, or intervention would be discussed at a future committee meeting.

7. New suggested agenda items for a future meeting.

There were no new suggested agenda items.

Meeting adjournment.

The meeting adjourned at 2:30 p.m.

Business and Professions Code (BPC) Laws

BPC 2570.2

(m) "Hand therapy" is the art and science of rehabilitation of the hand, wrist, and forearm requiring comprehensive knowledge of the upper extremity and specialized skills in assessment and treatment to prevent dysfunction, restore function, or reverse the advancement of pathology. This definition is not intended to prevent an occupational therapist practicing hand therapy from providing other occupational therapy services authorized under this act in conjunction with hand therapy.

BPC 2570.3

(e) An occupational therapist providing hand therapy services shall demonstrate to the satisfaction of the board that the occupational therapist has completed education and training in all of the following areas:

- (1) Anatomy of the upper extremity and how it is altered by pathology.
- (2) Histology as it relates to tissue healing and the effects of immobilization and mobilization on connective tissue.
- (3) Muscle, sensory, vascular, and connective tissue physiology.
- (4) Kinesiology of the upper extremity, such as biomechanical principles of pulleys, intrinsic and extrinsic muscle function, internal forces of muscles, and the effects of external forces.
- (5) The effects of temperature and electrical currents on nerve and connective tissue.
- (6) Surgical procedures of the upper extremity and their postoperative course.

California Code of Regulations (CCR) Regulations

CCR 4150. Definitions

(f) **"Rehabilitation of the hand, wrist, and forearm"** as used in Code section 2570.2(l) refers to occupational therapy services performed as a result of **surgery or injury to the hand, wrist, or forearm.**

CCR 4151. Hand Therapy

(a) Hand therapy services may be performed only when an occupational therapist has demonstrated to the Board in an application filed pursuant to section 4155 that they have met the post professional education and training requirements established by this section as follows:

(1) Education: Completion of 45 contact hours in the subjects listed in Code section 2570.3(e), including 30 hours specifically relating to the hand, wrist, and forearm.

(2) Training: Completion of 480 hours of supervised on-the-job training, clinical internship or affiliation, which may be paid or voluntary, pertaining to hand therapy.

(b) An occupational therapist whose application pursuant to section 4155 provides proof of current certification as a Certified Hand Therapist, issued by the Hand Therapy Certification Commission, shall be deemed to have met the education and training requirements established by this section.

(c) An occupational therapist providing hand therapy services using physical agent modalities must also comply with the requirements of section 4152. A maximum of 8 contact hours and 60 hours of supervised on-the-job training, clinical internship or affiliation, paid or voluntary, completed under section 4152 will be credited toward the requirements of this section.

(d) An occupational therapist may provide only those hand therapy services the occupational therapist is competent to perform.

CCR 4154. Post Professional Education and Training

(a) Post professional education courses shall be obtained at any of the following:

(1) College or university degree programs accredited or approved by ACOTE;

(2) College or university degree programs accredited or approved by the Commission on Accreditation in Physical Therapy Education;

(3) Colleges or universities with Speech and Hearing Programs accredited or approved by the Council on Academic Accreditation in Audiology and Speech-Language Pathology;

(4) Any approved provider. To be approved by the Board the provider shall submit the following:

(A) A clear statement as to the relevance of the course to the advanced practice area.

(B) Information describing, in detail, the depth and breadth of the content covered (e.g., a course syllabus and the goals and objectives of the course) particularly as it relates to the advanced practice area.

(C) Information that shows the course instructor's qualifications to teach the content being taught (e.g., his or her education, training, experience, scope of practice, licenses held, and length of experience and expertise in the relevant subject matter), particularly as it relates to the advanced practice area.

(D) Information that shows the course provider's qualifications to offer the type of course being offered (e.g., the provider's background, history, experience, and similar courses previously offered by the provider), particularly as it relates to the advanced practice area; or

(5) A provider that has not been approved by the Board, if the applicant occupational therapist demonstrates that the course content meets the subject

matter requirements set forth in sections 2570.3(e) or 2570.3(f) of the Code, or section 4153 of these regulations, and submits the following:

(A) Information describing, in detail, the depth and breadth of the content covered (e.g., a course syllabus and the goals and objectives of the course) particularly as it relates to the advanced practice area.

(B) Information that shows the course instructor's qualifications to teach the content being taught (e.g., his or her education, training, experience, scope of practice, licenses held, and length of experience and expertise on the relevant subject matter), particularly as it relates to the advanced practice area.

(b) Post professional training shall be supervised which means, at a minimum:

(1) The supervisor and occupational therapist have a written agreement, signed and dated by both parties prior to accruing the supervised experience, outlining the plan of supervision and training in the advanced practice area. The level of supervision is determined by the supervisor whose responsibility it is to ensure that the amount, degree, and pattern of supervision is consistent with the knowledge, skill and ability of the occupational therapist, and appropriate for the complexity of client needs and number of clients for whom the occupational therapist is providing advanced practice services.

(2) The supervisor is readily available in person or by telecommunication to the occupational therapist while the therapist is providing advanced practice services.

(3) The supervisor does not have a co-habitative, familial, intimate, business, excluding employment relationships, or other relationship that could interfere with professional judgment and objectivity necessary for effective supervision, or that violates the Ethical Standards of Practice, pursuant to section 4170.

(c) Any course instructor providing post-professional education under section 4154(a)(4) or (5) who is a health care practitioner as defined in section 680 of the Code shall possess an active, current, and unrestricted license.

(d) Post professional education and training must be completed within the five years immediately preceding the application for approval in each advanced practice area.

CCR 4155. Application for Approval in Advanced Practice Areas

In order to provide any of the advanced practice services set forth in Code section 2570.3(d), an occupational therapist shall apply to the Board and receive approval in that advanced practice area.

(a) To apply for approval, an occupational therapist shall submit to the Board an application as specified in subsections (1), (2), or (3), along with the required documentation.

(1) Applicants seeking approval in the area of Hand Therapy shall submit the [Application for Advanced Practice Approval in Hand Therapy](#) (Form APH, Rev. 10/09), hereby incorporated by reference;.

(2) Applicants seeking approval in the use of physical agent modalities shall submit the [Application for Advanced Practice Approval in Physical Agent Modalities](#) (Form APP, Rev. 07/11), hereby incorporated by reference;

(3) Applicants seeking approval in the area of Swallowing Assessment, Evaluation, or Intervention shall submit the [Application for Advanced Practice Approval in Swallowing](#) (Form APS, Rev. 10/09), hereby incorporated by reference;

(b) The documentation must include the following:

(1) Documented proof of attendance and completion of each course (i.e., certificate of completion or transcript).

(2) Evidence of the number of contact hours completed for each course for courses that are not Board approved.

(3) Outline or syllabus of each course for courses that are not Board approved.

(4) Information describing, in detail, the depth and breadth of the content covered

(e.g., a course syllabus and the goals and objectives of the course) as it relates to the advanced practice area.

(5) Resume or credentials of each instructor for courses that are not Board approved.

(6) Verification of completion of supervised on-the-job training, clinical internship or affiliation reflecting the nature of the training and the number of hours. Such verification must be signed by the supervisor(s) under penalty of perjury.

(c) An advanced practice application not completed within six months of receipt or notification of deficiency, whichever is later, shall be deemed abandoned.

(d) An application submitted subsequent to the abandonment of a previous application shall be treated as a new application.

Comparison of ACOTE Standards by Year Relating to Hand Therapy Education

	2008	2013	2020	2025
	Per ACOTE Standards, the student will be able to:			
Biomechanics	B.1.4	B.1.1	B.1.1	B.1.1
	Demonstrate knowledge and understanding of the structure and function of the human body to include the biological and physical sciences. Course content must include, but is not limited to, biology, anatomy, physiology, neuroscience, and kinesiology or biomechanics.	Demonstrate knowledge and understanding of the structure and function of the human body to include the biological and physical sciences. Course content must include, but is not limited to, biology, anatomy, physiology, neuroscience, and kinesiology or biomechanics.	Demonstrate knowledge of the structure and function of the human body to include the biological and physical sciences, neurosciences, kinesiology, and biomechanics.	Demonstrate knowledge of the structure and function of the human body that must include the biological and physical sciences, neurosciences, kinesiology, and biomechanics.
Orthotics	B.5.10	B.5.11	B.4.12	B.3.16
	Provide design, fabrication, application, fitting, and training in orthotic devices used to enhance occupational performance and training in the use of prosthetic devices, based on scientific principles of kinesiology, biomechanics, and physics.	Provide design, fabrication, application, fitting, and training in orthotic devices used to enhance occupational performance and participation. Train in the use of prosthetic devices, based on scientific principles of kinesiology, biomechanics, and physics.	Assess the need for orthotics, and design, fabricate, apply, fit, and train in orthoses and devices used to enhance occupational performance and participation. Train in the safe and effective use of prosthetic devices.	Assess the need for orthotics, and design, fabricate, apply, fit, and train in orthoses and devices used to enhance occupational performance and participation. Train in the safe and effective use of prosthetic devices used to enhance occupational performance.

	Definitions in ACOTE Standards			
	2008	2013	2020	2025
Body Function	The physiological functions of body systems (including psychological functions).	The physiological functions of body systems (including psychological functions).	“Physiological functions of body systems (including psychological functions)”	Not found
Body Structure	Anatomical parts of the body such as organs, limbs, and their components.	Anatomical parts of the body such as organs, limbs, and their components.	“Anatomical parts of the body, such as organs, limbs, and their components” that support body functions.”	Not found
Evaluations	The physiological functions of body systems (including psychological functions).	The physiological functions of body systems (including psychological functions).	<p>The process of obtaining and interpreting data necessary for intervention. This includes planning for and documenting the evaluation process and results.</p> <p>(AOTA, 2010, p. S107).</p>	<p>The comprehensive process of obtaining and interpreting the data necessary to understand the person, system, or situation. Requires synthesis of all data obtained, interpretation of data, reflective clinical reasoning, and consideration of occupational performance and contextual factors.</p> <p>Formative Evaluation: Evaluation method that includes data collected on an ongoing basis to determine incremental changes in a process or program.</p> <p>SUMMATIVE EVALUATION: Evaluation method that occurs less frequently than formative evaluation. Data is typically collected at the end of a process or program.</p>

The "Additional Terms Searched" below exclude review of the ACOTE Standards effective in 2008. If a term was not found in an ACOTE *Standard* but mentioned in the *Interpretive Guide*, it will be listed as **IG**, include the page number, and may contain the actual text or only a comment. Where "Not Relevant" is used below, it means that the term is included in the Standards but not relevant to the education required by CA to provide hand therapy.

	Additional Terms Searched			
	2008	2013	2020	2025
Disease	The 2008 Standards were not searched for the additional terms noted	<p>Term included as "<i>promotion of health and the prevention of disease</i>" in 'B' Standards.</p> <p>Included within definition of Population- Based Interventions " (p 42)</p> <p>Not relevant.</p>	<p>Wording similar to 2013 Standards.</p> <p>Not relevant.</p>	<p>Included in Standards B.2.5 Role in Promotion of Health and Prevention and B.2.6 Effects of Disease Processes</p> <p>Included within definitions of Health (p 49), Population- Based Interventions (p 50) and Scope of Practice (p 51)</p> <p>Not relevant.</p>
Diagnosis		<p>Standard B.4.0 (p 21)</p> <p>Included in Doctoral program <i>but not Master's</i> program</p>	<p>Standard B.4.0 (p 28)</p> <p>Included in <i>both</i> Doctoral and Master's program</p>	<p>Standard B.4.3 (p 28) Documentation of Services</p> <p>Defined on p 47.</p>
Electrical		<p>IG (p 30) <i>Skill, knowledge, and competencies for entry-level practice include... neuromuscular stimulation, functional electrical stimulation, transcutaneous electrical nerve stimulation, electrical stimulation for tissue repair..."</i></p> <p>Included within definition of Modalities (p 41)</p>	<p>Removed from IG but included within definition of Physical Agent Modalities (p 52)</p>	<p>Included within definition of Physical Agent and Mechanical Modalities (p 50)</p>

	2008	2013	2020	2025
Healing		Not found	Included within definition of Physical Agent Modalities (p 52)	Included within definition of Physical Agent and Mechanical Modalities (p 50)
Injury		Included in Basic Tenets of Occupational Therapy, Standards B.2.6 and B.2.9. Included in definition of Population-Based Interventions (p 42) Not relevant.	Included in Standard B.3.5. Effects of Disease Processes and in the definition of Population- Based Interventions (p 52) Not relevant.	Included in the definition of Population- Based Interventions (p 52) Not relevant.
Modalities		Standard B.5.15 “...safe and effective application of superficial thermal and mechanical modalities... to manage pain...” IG (p 26) and defined on p 41.	Only included within definitions of Physical Agent Modalities and Preparatory Methods and Tasks (p 52)	Only included within definition of Physical Agent and Mechanical Modalities (p 50)
Physiology		Standard B.1.1 , “Course content must include... physiology...”	Not found.	Included within the definition of Physical Agent and Mechanical Modalities (p 50)
Physiological		Only included within the definition of Body Functions (p 39)	Only included within the definition of Body Functions (p 47)	Not found.
Temperature		Included in Standard B.5.6 but not relevant.	Included in Standard B.3.7 but not relevant.	Included in Standard B.2.8 but not relevant.

	2008	2013	2020	2025
Tissue		IG (p 26) and included within definition of Modalities (p 41).	Only included within definition of Physical Agent Modalities (p 52)	Only included within definition of Physical Agent and Mechanical Modalities (p 50)
Treatment		<p>Included in Standard A.2.25, student must have “access to and have the opportunity to use the evaluative and treatment methodologies...”</p> <p>Not relevant.</p>	<p>Included in Standards A.2.13 Equipment, Supplies, and Evaluative & Treatment Methodologies (p 13) and B.4.29 Reimbursement Systems and Documentation (p 34)</p> <p>Included in definition of Preparatory Methods and Tasks (p 52)</p> <p>Not relevant.</p>	<p>Included in Standards A.2.11 Equipment, Supplies, and Evaluative & Treatment Methodologies and B.4.3. Documentation of Services</p> <p>Included in definitions of Behavioral Health (p 45) and Justice (p 49)</p> <p>Not relevant.</p>