CALIFORNIA BUSINESS AND CONSUMER SERVICES AGENCY • GAVIN NEWSOM, GOVERNOR
CALIFORNIA BOARD OF OCCUPATIONAL THERAPY
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BOARD MEETING MINUTES

May 21-22, 2026

University of St Augustine
For Health Sciences
700 Windy Point Drive, Room 206A
San Marcos, CA 92069

Board Members Present
Christine Wietlisbach – Board Vice President
Ada Boone Hoerl – Secretary
Luis Arabit
Vicky Santos
Erin Schwier

Board Staff Present
Austin Porter – Executive Officer
Helen Geoffroy – Board Attorney
Karina Clark – Analyst
Deepi Miller – Board Regulations Counsel

Board Members Absent
Beata Morcos – Board President
Matthew Greco

Thursday, May 21, 2026

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

   The meeting was called to order at 9:55 a.m. Secretary Ada Boone Hoerl called roll and a quorum was established.

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

   Vice President Christine Wietlisbach thanked the staff at University of St. Augustine for hosting the Board meeting and thanked all the staff that assisted in making the Board meeting possible.

   Vice President Wietlisbach shared that she and Executive Officer (EO) Austin Porter testified at the Board's Sunset Review Hearing on March 24, 2026, and that the hearing had been a successful one.

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

   Member Vicky Santos thanked the staff at University of St. Augustine for hosting the Board meeting.

Secretary Ada Boone Hoerl thanked Board staff for their efforts to provide a hybrid meeting option for member attendance and participation..

There were no further Board member remarks.

4. Public Comment for Items Not on the Agenda.

Samia Rafeedie, President of the Occupational Therapy Association of California (OTAC), introduced herself and thanked the Board. Ms. Rafeedie also stated she wished to bring attention to Assembly Bill (AB) 2497 – Physical Therapy Modernization Act, as it was not included on the list of bills to be discussed on this meeting's agenda. She further commented that many groups were in strong opposition to some of the language in the bill and that occupational therapy advocacy groups, in particular, were opposed to the following:

- A list of physical therapy interventions proposed to be modified from "…functional training in self-care…" to "…functional training, self-care…", which would establish self-care, as opposed to functional training relating to self-care, as a physical therapy intervention.
- A sentence proposed to be modified to end in "…and other health conditions", which OTAC feels should be more clearly tied to movement and mobility.
- An additional proposed change relating to how physical therapists address stress management, which OTAC also feels should be more clearly tied to movement and mobility.

Ms. Rafeedie also shared that OTAC would be presenting recommended language that had been developed in partnership with the American Occupational Therapy Association (AOTA) to the Physical Therapy Board the following week, to be considered as changes to AB 2497.

The following public attendees introduced themselves to the Board:

- University of St. Agustine Faculty and OTAC Vice President Kersten Laughlin.
- University of St. Augustine Occupational Therapy Student Cherelle Diggs.
- University of St. Augustine Faculty Cecilia Martinez.
- University of St. Augustine Occupational Therapy Student Vivian Rhodina.
- University of St. Augustine Occupational Therapy Student Krista Ernst.
- University of Southern California Faculty and OTAC Treasurer Candance Chatman.
- AOTA State Affairs Manager Kristen Neville.
- Sacramento City College Faculty Manpreet Nijjar Bhatti.
- National Board for Certification in Occupational Therapy (NBCOT) Assistant Director of External and Regulatory Affairs Francielle Pineda.
- AOTA Vice President of Health Policies and State Affairs Chuck Willmarth.
- Occupational Therapy Doctoral student working with AOTA Karissa Herrera.

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

5. **Review and vote on approval of February 26-27, 2026, Board meeting minutes.**

Secretary Ada Boone Hoerl requested the following corrections on page 11 to student names:

- "Tiana" to "Tianna"
- "Peddit" to "Pettit"
- "Adriana" to "Ariana"
- "Celina" to "Selena"
- "Agular" to "Aguilar".

Secretary Hoerl also requested clarification on the accuracy of committee Chair appointments in Item 23. Specifically, clarification was requested as to who had been appointed Chair of the Practice Committee.

EO Porter stated that staff would review the meeting recording again and make changes to the minutes, if needed. *(Subsequent review determined that the draft minutes had been accurate and no change was necessary.)*

- Vicky Santos moved to approve the February 26-27, 2026, meeting minutes with the requested changes.
- Luis Arabit seconded the motion.

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

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Absent
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

6. **Discussion and possible action on Letter from the Occupational Therapy Association of California (OTAC) to the Accreditation Council on Occupational Therapy Education (ACOTE) regarding the inclusion of "surgical procedures of the upper extremity and their post operative course" as an education standard.**

EO Porter recalled that during a previous meeting of the Board's Practice Committee to discuss and review the education requirements for Board approval in the advanced practice area of hand therapy, ACOTE Director of Accreditation Teresa Brininger had suggested that the Board submit a letter to ACOTE to request the inclusion of "surgical procedures of the upper extremity and their post operative course" in the forthcoming revision to ACOTE's accreditation standards. Since then, OTAC had submitted a letter to ACOTE making such a request, which had provided the Board with the opportunity to submit a letter of support.

A draft letter of support was presented to the Board at its February 26-27, 2026, meeting for review and approval. However, the Board requested additional language in the letter that would clarify the definition of "upper extremity" in the context of California's advanced practice requirements.

A revised draft of the letter was presented at the current meeting for further review and approval, which contained the following addition:

"When applied to the requirements for advanced practice approval for hand therapy in California, the upper extremity is taken to mean the hand, wrist, and forearm. Education that addresses this content area would cover surgery and injury to those parts of the body and would prepare an entry-level practitioner to provide care following such surgery."

- Ada Boone Hoerl moved to approve the letter as presented and direct staff to submit to ACOTE.
- Erin Schwier seconded the motion.

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

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Absent
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

7. Discussion and possible action on the requirements to be an Advanced Practice Reviewer or a Practice Reviewer for the Board.

EO Porter gave an overview of the current requirements to serve as an Advance Practice Reviewer or Practice Reviewer.

- Practice Reviewers are occupational therapy practitioners that are consulted during disciplinary matters. The requirements to be a Practice Reviewer are:

    - A current and active California OT or OTA license without restrictions.
    - No prior or current charges or discipline against any health care related license in California or in any other place of licensure.
    - No criminal convictions, including any that were expunged or dismissed.
    - Ten or more years of experience with seven years of recent experience in the area of expertise for which the reviewer would be rendering a professional opinion.

- Advance Practice Reviewers review and approve courses for advanced practice education. The requirements to be an Advance Practice Reviewer are:

    - A current and active California OT license without restrictions.
    - No prior or current charges or discipline against any health care related license in California or in any other place of licensure.
    - No criminal convictions, including any that were expunged or dismissed.
    - At least five of the past seven years practicing in an advanced practice area.

EO Porter relayed that Board staff had recently received an application to serve as an advanced practice reviewer from a practitioner that had an unrestricted California OT license, but did not currently reside and practice in California. This led staff to seek clarification from the Board as to:

- Whether practice reviewers and advanced practice reviewers should be required to reside and practice in California during their contract, and
- What was meant, specifically, by “Ten or more years of experience with seven years of recent experience…” as it pertained to the practice reviewer requirements.

Vice President Wietlisbach summarized that the intent of the requirements is to ensure that reviewers have an adequate understanding of California law and that they are up to date on contemporary standards of practice. She suggested that the Board begin discussion with the experience requirement for practice reviewers.

Secretary Hoerl suggested mirroring the language of the experience requirement for advanced practice reviewers, requiring that practice reviewers have “At least seven of the last ten years practicing in…”

EO Porter pointed out that while that requirement was more clear, it would allow for a practice reviewer to have been away from their practice area for up to three years while still rendering professional opinions for the Board.

Member Erin Schwier stated that some areas of practice change and develop rapidly and that qualifying experience should be from the immediate last seven years. This

would keep the consumer safe as the reviewing practitioner would be up to date with the most current standards of practice.

Member Luis Arabit expressed agreement with Member Schwier and stated that if a reviewer was practicing in another state, staff should verify the status of their license in that state.

Vice President Wietlisbach stated that, while immediate recent experience seems like an obvious choice at first, there are many practitioners who are recently retired or have been practicing in different fields for a short time that she feels would be qualified reviewers.

EO Austin Porter clarified that practice reviewers are not the decision makers in any disciplinary case, and that their opinions are taken as evidence for the purposes of administrative hearings.

Public Comment

Candace Chatman, OTAC Treasurer, asked how the Board lets the public know this is a role they can fulfill.

EO Porter responded that Board has a page on its website dedicated to recruiting reviewers. He stated he has reached out to OTAC in the past when a specific type of reviewer is needed and they have assisted the Board with this task.

Ms. Chatman thanked EO Porter for his answer and suggested this information be on the main webpage of the Board. EO Austin Porter agreed and said he would ensure this is added to the Board's main page.

OTAC President Samia Rafeedie asked if the applicants were required to complete an attestation with their application to ensure they have been practicing or kept up their education in the specific field they are requesting to be reviewers for.

EO Porter responded that, while the current application does not include an attestation regarding continuing education efforts in a specific field, it does require that the applicant attest that the information and experience provided is true and correct.

Mr. Porter called the Board's attention to the fact that reviewer contracts last for three years. Therefore, an applicant that had a three-year gap in experience at the beginning of their contract could be reviewing cases at the end of their contract with a six-year gap in related experience.

Vice President Wietlisbach asked if any members had concerns about practitioners outside of California rendering opinions on practice in California.

Member Schwier responded that she did not have concerns as long as they had a current California license.

Public Comment

Samia Rafeedie commented that an internet search revealed that most courts prefer no more than a three-to-five-year gap in recent experience.

Discussion ensued regarding the possibility that a licensee practicing in another state may have adequate experience in an advanced practice area to review those types of cases, but that they may not actually have Board approval in that advanced practice area since the experience could have been gained in that other state.

EO Porter agreed with Board's suggestion that, if reviewer positions were opened up to licensees practicing in other states, staff should ensure that they have advance practice approval from CBOT prior to approving their contract.

The Board further discussed whether to accept practice reviewers residing and practicing out of state, particularly for those applying to render opinions on cases related to advanced practice.

EO Porter clarified that the Board's discussion on experience requirements had so far determined that practice reviewers should have a minimum of eight of the last ten years practicing in the area they would be reviewing cases. He suggested that further requiring those eight years to be in California would allow for practitioners currently out-of-state to render opinions as long as they have not been outside California for more than 2 years.

Member Schwier summarized the ensuing discussion as follows.

- Board discussion up to this point suggested that it would be acceptable to require:
  - Practice reviewers have eight years of experience from the last ten years in their case area, and
  - Practice reviewers rendering opinions on advanced practice cases have eight years of California experience from the last ten years in that advanced practice area.

Vice President Wietlisbach expressed concerns about not requiring California experience for all practice reviewers.

Member Schwier agreed that requiring California experience for all practice areas would be acceptable. Secretary Hoerl agreed.

Further discussion ensued and the Board came to the consensus that practice reviewers should have eight years of California experience from the last 10 years, regardless of their practice area.

Public Comment

Jaynee Taguchi Meyer, Co-Chair of the California Occupational Therapy Fieldwork Council (COTFC), introduced herself and agreed with the Board.

OTAC President Samia Rafeedie commented that accounting for the culture of practice in a state makes a lot of sense. She asserted that CA is different from a lot of other states. She has practiced as a travelling OT in a number of other states where speech therapists run certain practice in some states, while OTs run that practice in others.

EO Austin Porter committed to working on final language that will be added to the Practice Reviewer and Advance Practice Reviewer applications that will be posted on the Board's website once updated.

Vice President Christine Wietlisbach, suggested the following language on the requirement for Advanced Practice Reviewers:

- Five years of California experience from the last seven years in an advanced practice area.

All Board members agreed on the suggested language.

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

8. Regulatory Update.

A table of the Board's pending rulemakings and their statuses is available in the meeting materials. The only update since this information was last presented to the Board pertained to a pending rulemaking to amend California Code of Regulations (CCR) section 4130 – *Fees.*

Mr. Porter stated this rulemaking has been publicly noticed on the Board's website and with the Office of Administrative Law for the required 45-day comment period. The comment period will end on May 26, 2026. If no adverse comments are received the Board will proceed to a final filing with the Office of Administrative Law.

No other regulatory updates were presented to the Board.

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

9. Discussion and possible action to modify the effective date in the pending rulemaking to amend Section 4130 (*Fees*) of title 16 of the California Code of Regulations (CCR).

EO Porter explained that, in general, the Office of Administrative Law (OAL) puts approved regulatory changes into effect on specified, quarterly dates. The Board's rulemaking package to amend Section 4130 (Fees) of title 16 of the California Code of Regulations (CCR) included that language the would require higher renewal fees as of the next OAL effective date, July 1, 2026.

Mr. Porter further explained that, while it was technically possible to obtain approval for the rulemaking from OAL before this next effective date, it was also likely that approval would not come in time. As such, he requested authority from the Board to modify the proposed regulatory text by changing the date of the fee increase to the next quarterly OAL effective date, October 1, 2026.

- Ada Boone Hoerl moved to authorize the Executive Officer to change the effective date to October 1, 2026, as needed, of the pending rulemaking to amend Section 4130 (Fees) of title 16 of the California Code of Regulations (CCR) based on filing deadlines.
- Luis Arabit seconded the motion.

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

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Absent
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

10. Discussion and possible action to consider initiation of rulemaking to amend Sections 4180 (*Definitions*) and 4181 (*Supervision Parameters)* of title 16 of the CCR.

EO Porter stated that this agenda item was a carryover from the February 27th, 2026, Board meeting. At that meeting, robust discussion had resulted in Board and public agreement on the proposed text, with some edits. Since then, Mr. Porter and Regulatory Counsel Deepi Miller had taken those requested edits and worked them into the proposed text, which was now before the Board for final approval.

EO Porter provided a verbal overview of the proposed text presented in the meeting materials, which included all proposed amendments and showed new amendments since February with a highlight.

The first new amendments discussed by the Board were:

- A definition of “direct supervision”
- A change to the definition of “level II fieldwork supervision”

Vice President Wietlisbach felt that the amendments as presented captured the Board’s request from the last meeting.

Public Comment

AOTA State Affairs Manager Kristen Neville recalled that this particular change had been requested by AOTA and by OTAC at the previous meeting and thanked the Board for making the revisions to the text.

OTAC President Samia Rafeedie also thanked the Board for making the revisions.

COTFC Co-Chair Jaynee Taguchi Meyer asked the Board for clarification on the definition of “faculty led fieldwork” as presented in the text.

Member Schwier clarified that the included definition was intended to capture primarily level I fieldwork conducted by faculty in partnership with practitioners in the community.

Further new amendments discussed included:

- A non-substantive change to subsection 4181(a)
- The addition of “…individuals from the following categories, in any combination, at any one time:” in subsections 4181(d) and 4181(g)
- That supervision under subsections 4181(e) and 4181(i) shall also comply with the requirements of subsections 4181(d) and 4181(g), respectively.

To see all amendments to the regulatory text, please see the meeting materials.

There were no Board member remarks regarding the changes.

Public Comment

AOTA State Affairs Manager Kristen Neville requested clarification on what at “any one time” under supervision meant. Members of the Board clarified that “at any one time” meant while the supervisee was engaged in the activities for which they were being supervised.

Kristen Neville sought additional clarification on subsection 4181(h) and whether that meant that an OT could supervise three individuals from subsection (g) and an additional three OTAs. The Board clarified that this was correct.

- Luis Arabit moved to approve the proposed regulatory text for Sections 4180 and 4181 as presented, direct staff to submit the text to the Director of the Department of Consumer Affairs and the Business, Consumer Services, and Housing Agency for review, and if no adverse comments were received, authorized the executive officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the package, and set the matter for a hearing if requested. If no adverse comments are received during the 45-day comment period and no hearing is requested, authorized the Executive Officer to take all steps necessary to complete the rulemaking and adopt the proposed regulations at Sections 4180 and 4181 of Title 16, California Code of Regulations as noticed, with the authority to make any technical or nonsubstantive changes.
- Erin Schwier seconded the motion.

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

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Absent
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

11. Discussion and possible action regarding the Occupational Therapy Licensure Compact. *(This agenda item was discussed on May 22, 2026.)*

EO Porter gave an overview of the Occupational Therapy Licensure Compact that was discussed at the February 9-10, 2023, Board meeting. Relevant excerpts of the meeting minutes from that discussion were included in the materials and those minutes showed that the Board had ultimately decided not to pursue joining the Compact at that time.

Mr. Porter stated that this item was before the Board again because it had not been discussed in a long time, there were many new members on the Board, and it may be prudent to reevaluate whether joining the Compact was feasible.

Member Schwier stated that she agreed with the Board's previous decision not to join the Compact as it would be challenging to monitor those practicing under Compact privileges and it would not be in the best interest of California consumers.

Vice President Wietlisbach echoed the sentiments of Member Schwier, adding that the biggest barrier to joining the Compact would be passing the model legislation in the materials.

Board members discussed the materials provided and agreed that the licensure compact would not be beneficial for the California consumer and the legislative process would be lengthy and not in the best interest of the consumer.

Member Greco asked for clarification as to why the Compact was being considered by the Board, stating that, while he saw the value from an efficiency perspective, he did not see how it would be a benefit to consumers. He asked who or what was the driving force behind the licensure compact.

EO Porter clarified that the Compact was a joint effort from the American Occupational Therapy Association and the National Board for Certification in Occupational Therapy. He also suggested that potential consumer benefits could include an increase in the OT and OTA workforce in California, which could alleviate issues of consumer access to services.

Secretary Hoerl further addressed the question, sharing that there was a breadth of data that indicated difficulties with consumer access to medical care in rural areas of the state.

Secretary Hoerl also referred back to the Board's discussion in Agenda Item 7 on contracting with practice and advanced practice reviewers from out of state as evidence supporting the difficulties with joining the Compact.

Public Comment

OTAC President Samia Rafeedie reported that OTAC members do ask the organization if and when California will join the licensure compact. She also reported that she worked with a legislative team and had been advised that the occupational therapy compact bill would not be passed in California, citing other healthcare professions that have tried to pass licensure compact legislation without success.

AOTA State Affairs Manager Kristen Neville shared that Tennessee had started issuing Compact privileges, which was not identified in the list of Compact states in the materials. She added that Alaska had also voted to pass legislation. She added that the Compact initiative stemmed from long-standing concerns regarding licensure portability for members of the military and rural access to services.

She explained that AOTA has asked States to join the compact, is to allow rural areas and military members and their spouses accessibility to practice anywhere in the country.

Samia Rafeedie asked what the average time was from application to licensure for applicant licensed in another state.

EO Porter stated that approval takes no more than 30 days if all documents are received timely, but that delays can happen when license verifications are missing from the other states where the applicant is licensed. He also stated that applicants with unrestricted licenses in other states are permitted to practice supervised in California for up to 60 days while awaiting approval, pursuant to Business and Professions Code section 2570.4(d).

Vice President Wietlisbach thanked Ms. Neville for her comments and attendance at the Board meeting and stated that the California Board of Occupational Therapy would not be moving toward joining the compact at this time.

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

12. **Discussion and possible action regarding seeking an exemption from the independent contractor ABC test (Labor Code Section 2775(b) under Labor Code section 2783.** *(This agenda item was discussed on May 22, 2026.)*

EO Porter explained that this topic was before the Board because it had been an issue raised by the Legislature in the Board's Sunset Review. Labor Code Section 2775 sets the standards by which California Law determines if a worker is considered an independent contractor or an employee. However, some professions have sought and been granted an exemption from these standards under Labor Code Section 2783, which allows more freedom for members of that profession to be considered independent contractors.

Proposed amendments to section 2783 were presented in the materials for the Board's approval, should they choose to seek an exemption.

Public Comment

OTAC President Samia Rafeedie shared that the Association hears concerns about Labor Code Section 2775 from its members that work in home health and school-based OTs. Ms. Rafeedie stated that OTAC would support the Board if they choose to pursue this exemption.

Board members expressed concerns that most practitioners prefer working as an employee and that working as an independent contractor comes with additional responsibilities, such as general liability insurance.

EO Porter noted that OT practitioners are currently subject to the ABC test in section 2775, which is strict and mandates that any worker not satisfying all three conditions of the test be considered an employee. However, professionals that are exempt under

Labor Code section 2783 are subject to the Borello test, which takes a much more holistic and interpretive approach in making that determination. An exemption would likely not force someone who is currently considered an employee to work as an independent contractor instead.

Member Greco stated that while discussion so far had provided evidence that working as an independent contractor was an attractive proposition to some practitioners, there had not been any evidence to show that the current law was preventing them from doing so. He expressed concern that an exemption would give more power to employers rather than more freedom to workers.

The Board examined the requirements of the ABC test and clarified that the test did prevent employers from hiring independent contractors in situations were being able to do so would increase access to services.

- Erin Schwier moved to direct staff to seek legislation to enact the changes as presented in the materials to Labor Code section 2783.
- Ada Boone Hoerl seconded the motion.

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

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Yes
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

PUBLIC HEARING

The Board held a hearing for a petition for early termination of probation from petitioner Sabrina Sabet.

The hearing commenced at 1:33 pm. and was presided over by Administrative Law Judge Abe Levy.

CONVENE IN CLOSED SESSION

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

Pursuant to Government Code Section 11126(a)(1), the Board met in closed session to conduct an annual performance evaluation and consider the salary of its Executive Officer.

MEETING RECESS

At 3:52 p.m. the Board recessed until the following day.

BOARD MEETING MINUTES

May 21-22, 2026

University of St Augustine
For Health Sciences
700 Windy Point Drive, Room 206A
San Marcos, CA 92069

Board Members Present
Christine Wietlisbach – Board Vice President
Ada Boone Hoerl – Secretary
Luis Arabit
Matthew Greco
Virginia Santos
Erin Schwier

Board Staff Present
Austin Porter – Executive Officer
Karina Clark - Analyst
Helen Geoffrey – Board Attorney
Deepi Miller – Board Regulations Counsel

Board Member Absent
Beata Morcos – Board President

Friday, May 22, 2026

13. **Call to order, roll call, establishment of a quorum.**

    The meeting was called to order at 9:32 a.m. Secretary Ada Boone Hoerl called roll and a quorum was established.

14. **President's Remarks – Informational only; no Board action to be taken.**

    There were no remarks from the Vice President.

15. **Board Member Remarks – Informational only; no Board action to be taken.**

    Member Matthew Greco thanked Board staff for facilitating participation via WebEx.

    There were no other Board member remarks.

16. **Public Comment for Items not on the Agenda.**

    There were no requests for public comment.

17. **Discussion and overview of the Board's jurisdiction and authority; legislative and regulatory action.**

EO Porter provided a verbal overview of the document in the materials, “Overview of Board’s Duty and Authority to Protect the Public”. It explained that the Board’s ability to seek legislation changes or code section changes was dependent on whether the sought changes were for the benefit of the consumer, particularly when the changes concerned scope of practice for the profession:

“*These differences are important to bear in mind when discussing scope of practice issues for the profession of occupational therapy. When considering whether to pursue legislation to include or prohibit a specific service in the scope of practice, the Board must remember to act, first and foremost, for the protection of the public.*”

The document further explained that the Legislature expects legislation seeking to expand scope of practice to come from professional associations, which advocate for the practitioners.

Ada Boone Hoerl suggested this information be posted on the Board’s website to educate the consumer on the Board’s mandate to protect the consumer.

Public Comment

Samia Rafeedie asked about the example in the document concerning the North Carolina Dental Board.

Board Counsel Helen Geoffrey explained the limitation a Board has in implementing restrictions. The example of the North Carolina Dental Board was discussed to emphasize how a “restriction” by a Board can be overturned when there is no public safety risk involved when performing a service.

Christine Wietlisbach thanked EO Austin Porter and Attorney Helen Geoffrey for bringing this to the Board.

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

18. Discussion and possible action regarding Sensory Integration Interventions.

EO Porter presented the letter sent to the Board from OTAC regarding Sensory Integration Interventions and invited Samia Rafeedie to give additional information.

OTAC President Samia Rafeedie and OTAC Vice President Kristen Laughlin presented a summary of the concerns submitted in the letter regarding whether the sensory integration techniques and sensory processing interventions should be included in the occupational therapy scope of practice.

They shared the results of a survey sent to OTAC members which showed a pattern of these services being performed by non-occupational therapy licensed professionals and non-licensed professionals. The providers most frequently identified included:

- Board Certified Behavioral Analysts (BCBA)
- Registered Behavioral Technicians (RBTC)
- Applied Behavior Analysts (ABA)
- Speech Language Pathologists
- Early Interventionists
- Aides
- Other para-professionals

Ms. Rafeedie further stated that, according to the survey responses, the above-mentioned professionals were observed providing sensory interventions, sensory diets, feeding interventions, activities of daily living (ADLs), and visual-motor interventions without occupational therapy training or oversight. Respondents also expressed concerns regarding safety and clinical appropriateness, which they believed could create consumer confusion and potentially place children and their families at risk. Some of the respondents to the survey were concerned that occupational therapy services were becoming increasingly viewed as interchangeable, despite the specialized education and clinical reasoning required for pediatric occupational therapy, sensory integration, feeding, activities of daily living (ADL), and occupation-based intervention.

OTAC stated that their concern arises from occupational therapy specific interventions being implemented independently without occupational therapy involvement, training or supervision.

Respondents requested clear guidance and stronger recognition of occupational therapy scope of practice, including:

- Clear recognition of sensory integration and sensory processing within occupational therapy practice.
- Stronger consumer protection language.
- Support for practitioners encountering scope encroachment.
- When these services may constitute unlicensed practice.

Ms. Rafeedie requested the Board clarify when these services may constitute unlicensed practice consider the questions raised in the letter from the Association. From the letter and the survey conducted OTAC realized something must be done.

Vice President Wietlisbach asked how sensory integration may look different when provided by a non-OT professional as opposed to an OT practitioner.

Board Member Erin Schwier responded that the differences between an occupational therapist and non-licensed professional providing these services may not be

immediately apparent to someone not professionally trained to provide these services. However, Ms. Schwier further explained that an untrained/non-licensed professional can cause more harm to the consumer, as they are not fully trained in providing these services and may use them to try to facilitate therapeutic outcomes or to modify behavior. Member Schwier clarified that there is not cause for concern when an interdisciplinary approach is used and an OT is involved in the services, but that concern arises when facilities opt not to involve an OT because they feel that other types of professionals are sufficient. Ms. Schwier stated that Sensory Processing should be added to the Practice Act to make it clear for providers as this has the potential for misuse of sensory integration and interventions that could lead to *increased* risk behaviors.

Vice President Wietlisbach thanked Member Schwier for her explanation and asked whether this meant that sensory integration is occupational therapy or that it is something occupational therapy practitioners use.

Member Schwier responded that it is both and that she would be in favor of including sensory processing language in the OT scope of practice.

Member Greco thanked Member Schwier for her thorough explanation and stated that, while opposed to creating unnecessary barriers, he felt making taking steps to codify the necessity of trained OT expertise being applied to sensory intervention was not such a barrier and would serve to protect consumers.

Board attorney Helen Geoffrey stated that the Occupational Therapy Association of California (OTAC) should be the association to petition to the legislation to ensure these services are added to the Practice Act. She further explained that the Board must work within the Practice Act given to the Board by legislature, as this change request from the licensing Board would be seen as mainly benefiting the licensees.

Ms. Rafeedie asked if the Board could conduct education and outreach to students, schools, and consumers via CBOT's website or emails. EO Austin Porter stated the Board currently has access to reach out to licensees to educate them and can post the information on the website, at the direction of the Board.

Ms. Wietlisbach suggested the Education and Outreach Committee meet to develop the language and education materials for CBOT's website.

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

19. Update on the Board's Sunset review. Discussion and possible action regarding Assembly Bill (AB) 2773.

EO Porter gave a brief overview of the Board's Sunset Review Background Paper and materials presented.

EO Austin Porter clarified that the responses provided in the paper were suggestions on how the Board could address the issues raised by the Legislature, but that the Legislature had not directed the Board to take any specific action at this time.

EO Austin Porter presented the draft letter of support for the Board's Sunset bill, Assembly Bill (2773).

- Vicky Santos moved to support Assembly Bill 2773 and direct staff to submit the letter as presented.
- Erin Schwier seconded the motion.

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

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Yes
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

20. Legislative Update.

a. Review, discussion, and possible action regarding Board positions on the following bills:

- Assembly Bill (AB) 54, Krell. Access to safe abortion care act.

  Ordered to inactive file on September 10, 2025.

- AB 1558, Arambula. Uniform emergency volunteer health practitioners act.

  Held under submission as of May 14, 2026.

- AB 1767, Berman. Dept. of Consumer Affairs: public members of boards: conflicts of interest.

  Vice President Wietlisbach expressed an opinion of support.

  - Luis Arabit moved to support AB 1767.
  - Matthew Greco seconded the motion.

There were no public comments.

Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Yes
Vicky Santos	Yes
Erin Schwier	Yes

The motion carried.

- AB 1775, Ward. Veterans.

  No Board action taken.

- AB 1979, Bonta. Healthcare services: artificial intelligence.

  - Erin Schwier moved to support AB 1979.
  - Ada Boone Hoerl Seconded the motion.

  There were no public comments.

  Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Yes
Vicky Santos	Yes
Erin Schwier	Yes

  The motion carried.

- AB 2140, Johnson, Healing arts: reports: claims against licensees.

  Died in committee.

- AB 2551, Elhawary. Health care coverage.

  The Board decided to watch AB 2551.

  There were no public comments.

- AB 2773. Board of occupational therapy: sunset bill.

  Discussed during Agenda Item 19. The Board took a support position.

- Senate Bill (SB) 903, Padilla. Mental health professionals: artificial intelligence.

  - Luis Arabit moved to support SB 903.
  - Ada Boone Hoerl seconded the motion.

  There were no public comments.

  Board Member Vote

Beata Morcos	Absent
Christine Wietlisbach	Yes
Luis Arabit	Yes
Ada Boone Hoerl	Yes
Matthew Greco	Yes
Vicky Santos	Yes
Erin Schwier	Yes

  The motion carried.

- SB 980, Hurtado. Access to medical records.

  Died in committee.

- SB 1391, Wahab. Dept. of Consumer Affairs: retired category licenses.

  There were no public comments.

  The Board decided to watch SB 1391.

- SB 1445. Healing Arts.

  There were no public comments.

  The Board decided to watch SB 1445.

b. Update on chaptered, vetoed, and dead bills.

EO Porter advised that the bills in the materials for this section were dead and included for informational purposes only.

21. Executive Officer's Report.

a. Administrative Update including information on Board's budget, personnel, BreEZe.

The Executive Officer gave a verbal overview of the memo and the data provided in the materials.

b. Licensing Unit data.

The Executive Officer gave a verbal overview of the data provided in the materials.

c. Enforcement Unit data.

The Executive Officer gave a verbal overview of the data provided in the materials, noting that address change violation cases were on the decline.

There were no public comments.

22. Suggestions for future agenda items.

There were no suggestions for future agenda items.

There were no public comments.

MEETING ADJOURNMENT

The meeting adjourned at 1:02 p.m.