

## **AGENDA ITEM 4**

**REVIEW AND VOTE ON APPROVAL OF THE AUGUST 14, 2024, COMMITTEE MEETING MINUTES.**



**\*\* DRAFT \*\***

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

**August 14, 2024**

**Committee Members Present**

Denise Miller, Chair/Board Member  
 Beata Morcos, Board Vice President  
 Sharon Pavlovich, Board Member  
 Cesar Arada  
 Candace Chatman  
 Joyce Fries  
 July Mclaughlin Gray  
 Domenique Hendershot-Embrey  
 Ada Boone Hoerl  
 Heather Kitching  
 Kersten Laughlin  
 Terry Peralta-Catipon  
 Liz Phelps  
 Penny Stack

**Board Staff Present**

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

**Committee Members Absent**

Samia Rafeedie  
 Erin Schwier

**Wednesday, August 14, 2024**

**8:00 am – Committee Meeting**

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

The meeting was called to order at 8:02 a.m., roll was called, and a quorum was established.

2. Committee Chair’s Opening Remarks.

Chair Denise Miller welcomed all in attendance. Ms. Miller summarized the committee’s discussion items at the April 12, 2024, meeting as follows:

- Concern regarding the term “services” in Section 4181(e) prompted the suggested language: “prior to when providing occupational therapy services, education, supervision, and practice.”
- Some programs have students fulfill their capstone experience during the pre-accreditation phase; therefore, using the phrase, “Accreditation Council of Occupational Therapy Education (ACOTE)-accredited and pre-accredited doctoral degree program” was recommended.

- ACOTE defines “pre-accreditation” as the point in time at which the education program submitted its self-study or was close to doing so.
- The next steps for the committee included:
  - Reviewing literature and statistics to see if the proposed supervision ratios were justified;
  - Inviting an ACOTE representative to the next meeting;
  - Researching other states “supervision limitations” and “ratios” and
  - Clarifying the phrase “at any one time.”

Chair Miller summarized the committee’s discussion at the June 26, 2024, meeting as follows:

- ACOTE’s Director reported that the standards were written to be general and not prescriptive.
- Moving “at any one time” to the beginning of the proposed language was suggested.
- Removing OTAs from the proposed supervision limitation language and creating a new section for them was suggested. and
- Defining “faculty-led fieldwork” and “faculty-led site visits.”

### 3. Public Comment for Items Not on the Agenda.

There were no public comments for items not on the agenda and the public attendees chose not to introduce themselves.

### 4. Review and vote on approval of the April 12, 2024, committee meeting minutes.

- Penny Stack moved to approve the April 12, 2024, committee meeting minutes.
- Beata Morcos seconded the motion.

There were no additional committee member remarks.

There were no public comments.

#### **Committee Member Vote**

Beata Morcos	Yes
Sharon Pavlovich	Yes
Cesar Arada	Yes
Candace Chatman	Yes
Joyce Fries	Yes
July Mclaughlin Gray	Yes
Domenique Hendershot-Embrey	Yes
Ada Boone Hoerl	Yes
Heather Kitching	Yes
Kersten Laughlin	Yes
Terry Peralta-Catipon	Yes
Liz Phelps	Yes
Penny Stack	Yes
Denise Miller	Yes

The motion carried.

5. Review and vote on approval of the June 26, 2024, committee meeting minutes.

- Heather Kitching moved to approve the June 26, 2024, committee meeting minutes.
- Julie Mclaughlin Gray seconded the motion.

There were no additional committee member remarks.

There were no public comments.

**Committee Member Vote**

Beata Morcos	<b><i>Abstained</i></b>
Sharon Pavlovich	Yes
Cesar Arada	Yes
Candace Chatman	Yes
Joyce Fries	Yes
July Mclaughlin Gray	Yes
Domenique Hendershot-Embrey	Yes
Ada Boone Hoerl	Yes
Heather Kitching	Yes
Kersten Laughlin	Yes
Terry Peralta-Catipon	Yes
Liz Phelps	Yes
Penny Stack	Yes
Denise Miller	Yes

The motion carried.

6. Consideration and possible recommendation to the Board on amending the California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4180, Definitions, and Section 4181, Supervision Parameters.

Chair Miller invited Ms. Kitching to discuss her comment that she emailed to the Executive Officer regarding proposed amendments to Section 4181(e)(2).

Ms. Kitching summarized her concern that the distinction between entry-level capstone students versus post-professional remained unclear. In her opinion, post-professional students should not be included in the list of whom “no more than a total of three” shall be supervised at any one time. There are also doctoral capstone students who are post-professional students; meaning they are already in practice and licensed and those individuals would not require the same level of supervision.

Ms. Miller thanked Ms. Kitching for her comment. Ms. Miller reminded the committee that at the last meeting, the committee had a robust discussion in terms of what “at any one time” meant. The committee also discussed the phrase, “no more than” and identified that more occupational therapy assistants could be supervised than students at any one time or the number should be equal. However, Ms. Miller suggested that the committee begin with wrapping up their discussion regarding the California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4180. Ms. Miller asked the committee to think about Section 4180 in terms of licensed versus unlicensed practitioners in future discussions.

Ms. McLaughlin Gray agreed with Ms. Kitching in terms of distinguishing between entry-level and post-professional student capstone experiences. She also suggested the committee add “doctoral capstone student” to 4180(c). She noted that although it was inferred, the committee could provide more clarity by using consistent language in 4180(a),(b), and (c).

Ms. Boone Hoerl added that she agreed with Ms. Kitching’s comments. Ms. Kitching’s letter inspired Ms. Boone Hoerl to research the American Occupational Therapy Association’s (OTA) language regarding capstone mentorship versus capstone supervision.

Ms. Hendershot Embrey stated that Section 4180 includes “entry-level” language and that repeating it in Section 4181 would be clearer.

Ms. Kitching expressed her appreciation for Ms. Miller’s comment regarding the need to focus on licensed versus unlicensed student supervision parameters.

Mr. Arada suggested that the Committee propose inserting “entry-level doctoral capstone student” in Section 4180(c) to distinguish entry-level versus post-professional doctoral capstone students. However, he did feel that it was clear that the language was for the supervision standards for the unlicensed students.

Ms. Miller suggested adding “entry-level” to language referencing doctoral capstone students.

Ms. McLaughlin Gray suggested keeping the language consistent across Section 4180(a), (b), and (c). She added that the suggested language "with the goal of developing competent, entry-level practitioners" would be clearer if it was “with the goal of developing entry-level competence" was used instead.

Ms. Boone Hoerl suggested language for 4180(b) read as “Level II Student means an occupational therapist or occupational therapy assistant student participating in delivering occupational therapy services to clients.”

Ms. Miller proposed defining an entry-level student as an occupational therapist or occupational therapy assistant student participating in delivering occupational therapy services to clients.

Ms. McLaughlin Gray liked Ms. Miller's proposed definition of entry-level students.

Ms. Stack agreed that the term “Level II” implies that it is entry-level, ACOTE-accredited, or in candidacy status, and focused on developing competency.

Ms. Pavlovich that those criteria need to remain as a large range of stakeholders need to be able to interpret the definition of Level II students.

Ms. McLaughlin Gray suggested placing the term “entry-level” before “occupational therapist” resulting in, “entry-level occupational therapist or entry-level occupational therapy assistant...”

Ms. Miller agreed that adding “entry-level” at the beginning of the definition provided clarity.

Ms. McLaughlin Gray agreed and suggested the definition be, “doctoral capstone student means an entry-level occupational therapy doctoral student completing a capstone project and experience” and removing, “while enrolled in an ACOTE-accredited doctoral degree program or doctoral program with ACOTE pre-accreditation or candidacy status.”

Chair Miller asked if it made sense to reference “ACOTE-accredited” and ACOTE pre-accredited somewhere else in the section and make a note that the terms “ACOTE-accredited” and ACOTE pre-accredited” pertain to all of the definitions.

Ms. Pavlovich stated that at Loma Linda University, to qualify for a post-professional program to earn a doctoral degree, it is required to pass the NBCOT exam and obtain licensure first, however, some programs do not have that requirement. She noted that as Ms. Martin mentioned earlier, some programs allow students to finish their program and enroll directly into an entry-level doctoral program without pursuing licensure.

Ms. Chatman suggested that “entry-level doctoral capstone students” and “post-professional doctoral capstone students” be defined separately. It would then be clear that the supervision parameter language only referred to entry-level doctoral capstone students. She noted that the current language in Section 4180(c) for a doctoral capstone student more accurately defined an entry-level doctoral capstone student.

Ms. Chatman also suggested a post-professional doctoral capstone student could be defined as “a licensed occupational therapist returning to an occupational therapy doctoral program.” She added that the post-professional doctoral capstone occupational therapy programs are not ACOTE-accredited.

Ms. Phelps said using the term “licensed” would be problematic because, for example, in her program, a short period exists when students are not licensed; meaning those students would not fit into either definition. She proposed the language, “a post-professional doctoral capstone student that has completed an entry-level degree.” Then it would be at the discretion of the fieldwork site to determine a student’s level of supervision based on whether or not they were licensed.

Chair Miller asked if for those programs that do not require licensure for enrollment, would it be problematic if California’s regulatory language pushed schools to require students to be licensed. Ms. Miller asked the Committee to consider where the programs are headed in terms of requirements in the future so they could recommend language to the Board that could potentially last many years.

Ms. Fries said that there used to be a requirement that the applicants had to have five years of clinical practice for admittance into a post-professional education program.

Ms. McLaughlin Gray asked if an unlicensed student is in a post-professional doctoral program, then the Committee wished to apply supervision standards, however, if the student is licensed then the Committee does not wish to apply supervision standards to

those individuals. In her opinion, the phrase, “doctoral capstone student” insinuates entry-level knowledge and abilities. In her program, doctoral capstone students are referred to as residents. She suggested adding “for the purpose of these regulations” to the definition of a doctoral capstone student. The definition would be, “A doctoral capstone student means either an entry-level occupational therapy doctoral capstone student completing a capstone project or capstone experience.” Alternatively, the definition could be, “an unlicensed post-professional occupational therapy doctoral capstone student.”

Ms. Chatman suggested defining the post-professional doctoral capstone student as, “a person who has received an entry-level occupational therapy degree and is either licensed or pursuing licensure while enrolled in a post-professional occupational therapy doctoral program.”

Ms. Martin noted that Business and Professions Code 2570.4(a) provides the Board authority over unlicensed students because they provide services to patients/clients. She suggested defining a student as “an individual enrolled in an ACOTE-accredited degree program or an educational program with ACOTE pre-accreditation or candidacy status.”

Chair Miller noted that the phrase, “with the goal of developing entry-level competence” distinguished the capstone from the Level I and the Level II students.

Ms. McLaughlin Gray pointed out that the terms “occupational therapist” and “occupational therapy student” are inconsistent among the definitions. In Section 4180(c) students are referred to as “occupational therapy students,” however, in Section 4180(a) and (b) the students are referred to as “occupational therapist” students. She recommended that the Committee use the same term throughout the section.

Ms. Peralta-Catipon said that regarding Section 4180(c) it was her understanding that the Committee was moving toward creating a distinction between Level I, Level II, and capstone students. According to ACOTE, Level I students gain an understanding of the needs of clients, Level II students prepare for entry-level competency, and for doctoral capstone students, the goal is to gain in-depth exposure to a specific area of practice.

Ms. Stack suggested that because the doctoral capstone project and experience occur together, the language could be, “completing a doctoral capstone project *and* experience.”

Chair Miller read the Committee’s proposed language thus far for Section 4180(c), “Doctoral capstone student means an occupational therapist student completing a doctoral capstone project and experience.”

Ms. McLaughlin Gray noted “with a goal of developing entry-level competence” only applied to Level II students. Ms. McLaughlin Gray suggested adding that phrase to Section 4180(b) and adding language to 4180(c) that described the goal of the doctoral capstone student, for example, “an in-depth experience and synthesis of knowledge.”

Ms. Martin suggested defining a Level II student as, “an occupational therapist or occupational therapy assistant student participating in delivering occupational therapy services to clients to develop entry-level competence” and removing “designed” from Section 4180(a).

Concern was noted that without the phrase, “participating in” in the Level II student definition, the fieldwork sites could potentially see a loophole; meaning the language could be interpreted as only the students are providing services.

Chair Miller announced that she felt the Committee had accomplished making the language in Section 4180(a), (b), and (c) consistent and the Committee had also identified new language to define a student.

Next, Chair Miller asked the Committee to focus on Sections 4180(d), (e), and (f) and began by stating that she was fond of the language proposed in Section 4180(d).

Ms. Stack agreed with the language proposed in Section 4180(d) as well.

Ms. Boone Hoerl noted that regarding Section 4180(d), ACOTE defined supervision as the direct inspection of quality of work and a supervisor as one who ensures tasks assigned to others are performed correctly and efficiently. ACOTE defines mentorship as dedicated to the personal and professional growth of the mentee. She suggested the Committee include a definition of mentorship as the demands of mentorship are different than the demands of clinical supervision.

Ms. Boone Hoerl cautioned the Committee to be careful not to equate supervision and mentorship as the rationale for the supervision ratios of the students.

Ms. Stack recalled a prior discussion regarding supervision versus mentorship and it was determined that the Board could not use the term mentorship in regulation.

Ms. Martin confirmed Ms. Stack’s recollection and explained that mentorship could not be used in the Board’s regulations as it was deemed too ambiguous; thus, the term supervision is used in both the Board’s statutes and regulations.

Chair Miller asked Ms. Martin if any changes to the language resulted from that discussion.

Ms. Martin replied that there were many iterations of the language and the language provided in the meeting materials and reflects the Committee’s suggestions to date except for the more recent callouts regarding the phrases, “no more than” and “at one time.” She clarified that the Committee still needs to discuss those phrases.

Ms. Miller asked why the term “mentorship” was still in Section 4180(d).

Ms. Stack agreed that the Committee should not use the term “mentorship” in that context and expressed that she was open to alternate language.

Ms. McLaughlin Gray noted that regarding Section 4180(c) and (d), supervision would be necessary when the student was providing a direct patient/client care experience,



and the mentorship would apply when the student was doing a capstone project or experience.

Ms. Stack noted that mentorship could be throughout the education process, not just when the students are hands-on with a patient/client. Mentorship should also include guiding the student through their capstone project or providing feedback on a report they might be working on.

Ms. McLaughlin Gray asked if the term “mentorship” really belonged in Section 4180 at all. In her opinion, only patient/care belonged in the guidelines.

Ms. Stack agreed with Ms. McLaughlin Gray.

Chair Miller suggested using “guidance” instead of “mentoring.”

Ms. McLaughlin Gray proposed using the term “oversight.”

Ms. Stack proposed the language, “supervision of a doctoral capstone experience means the supervision of the doctoral capstone student completing a direct patient/client experience” to keep the language consistent.

Ms. Martin opined that using the term “oversight” might be better because the ACOTE guidelines refer to the mentorship of a doctoral student but not to the supervision of a doctoral student. She recommended leaving the term “mentorship” in the definition because both ACOTE and AOTA publicly commented on that previously. This was to incorporate verbiage used in the ACOTE Guidelines and recognize that only students providing direct patient/client care needed supervision under a licensee.

Chair Miller asked if mentorship would be a concern for a patient/client who received services from a doctoral capstone student.

Ms. McLaughlin Gray noted that she liked the link to the ACOTE language described by Ms. Martin. Ms. McLaughlin Gray proposed the language, “supervision of a doctoral capstone experience means the mentorship of the doctoral capstone student when completing a direct patient/client experience.” Leaving “mentorship” in the definition would align the language with the ACOTE Guidelines and emphasize that the language pertained to when a student was providing direct patient/client care.

Chair Miller announced that the Board’s quarterly meeting was scheduled for August 22-23, 2024. The meeting was in person at Stanbridge University for those who wished to attend.

Ms. Miller added that Board staff would prepare a draft of the language based on the discussion today and be presented at the next Committee meeting.

Ms. Miller invited Committee members to send their comments about Sections 4180 and 4181 to Executive Officer Heather Martin in the interim; any comments received would be a springboard for discussion the next meeting.

The Committee agreed to meet again in September and Ms. Miller instructed Board staff to send out a Doodle Poll.

7. Review CCR Title 16, Division 39, to identify other sections possibly affected by proposed amendments to CCR Sections 4180 and 4181 and recommend proposed regulatory amendment(s) to the Board to ensure consistency.

*This item was tabled until the next meeting.*

**The meeting adjourned at 10:03 a.m.**

## **AGENDA ITEM 5**

**REVIEW AND VOTE ON APPROVAL OF THE SEPTEMBER 17, 2024, COMMITTEE MEETING MINUTES.**



**\*\* DRAFT \*\***

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

**September 17, 2024**

### **Committee Members Present**

Denise Miller, Chair/Board Member  
 Beata Morcos, Board Vice President  
 Cesar Arada  
 Ada Boone Hoerl  
 Candace Chatman  
 Dominique Embrey  
 Joyce Fries  
 Heather Kitching  
 July Mclaughlin Gray  
 Terry Peralta-Catipon  
 Samia Rafeedie  
 Penny Stack

### **Board Staff Present**

Heather Martin, Executive Officer  
 Rachael Hutchison, Manager  
 Austin Porter, Analyst

### **Committee Members Absent**

Sharon Pavlovich, Board Member  
 Kersten Laughlin  
 Jessica Padilla  
 Liz Phelps  
 Erin Schwier

**Tuesday, September 17, 2024**

**8:00 am – Committee Meeting**

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

The meeting was called to order at 8:15 a.m., roll was called and a quorum was established.

2. Committee Chair’s Opening Remarks.

Chair Denise Miller welcomed all in attendance.

3. Introductions by all Committee members.

The Committee members chose not to introduce themselves.

4. Public Comment for Items Not on the Agenda.

Ms. Deanna Mannarelli, Director of Fieldwork and Doctoral Capstone Coordinator for the Entry-Level OTD Program, and Assistant Professor of Clinical Occupational Therapy at the University of Southern California (USC) chose to introduce herself.

5. Review and vote on approval of the August 14, 2024, Committee meeting minutes.

*This agenda item was tabled until the next meeting.*

6. Consideration and possible recommendation to the Board on amending California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4180, Definitions, and Section 4181, Supervision Parameters.

Executive Officer Heather Martin summarized the highlights from the August 14, 2024, Committee meeting, which included the need to clarify what the terms “no more than” and “at any one time” meant regarding supervision limitations.

Chair Miller asked that the Committee discuss the language in Section 4181(d)(5) and (d)(6) regarding the appropriate ratio of occupational therapy assistants supervising Level I fieldwork students, or Limited Permit holders at any one time and Section 4181(d)(6) no more than twenty Level I fieldwork students in a faculty-led fieldwork. Ms. Miller added that it would be impossible to address each scenario, however, the Committee was tasked with determining a ratio for supervision with consumer safety in mind.

Ms. Stack recalled that the number three originated from a committee member from the perspective of a parent of a patient/client wondering if their child received an acceptable quality of care with twenty students being supervised in a room while receiving care. The number twenty for supervision of Level I fieldwork students in faculty-led fieldwork originated from the idea that a faculty member might bring a portion of their class to a faculty-led site, although their maximum was fifteen students.

A robust discussion ensued regarding the language in Section 4181(d)(5) and (d)(6) regarding the appropriate ratio of occupational therapy assistants supervising Level I fieldwork students, or Limited Permit holders at any one time and Section 4181(d)(6) regarding no more than twenty Level I fieldwork students in faculty-led fieldwork.

Concern was noted about how fifteen to twenty students would even fit into the physical space of the fieldwork sites and that the site environment should be considered in general whether it is a school-based or hospital site, etc.

Ms. Boone Hoerl mentioned that according to her research, 81% of the states and territories do not have student supervision caps or limitations. However, California is a highly regulated state and the existing ratios were present due to violations that have taken place.

Mr. Arada and Ms. Rafeedie expressed concern about lumping Level I and Level II fieldwork students together when considering supervision limitations as they have different levels of familiarity.

The Committee discussed whether or not a Doctoral Capstone Student needed supervision.

A robust discussion ensued regarding separating Level I fieldwork students, Level II fieldwork students, and Limited Permit holders regarding supervision limitations. Concerns about consumer safety, practice setting, and corporations forcing

practitioners to have the maximum number of students to supervise to leverage free labor were raised. Another trepidation was that the practitioner's responsibility for patients/clients increases exponentially when supervising students.

Many Committee members agreed that three was a good maximum for the number of Level II students to be supervised at any one time.

After reviewing Florida's supervision guidelines, a suggestion was made to format California's guidelines similarly.

### **Public Comment**

Deanna Mannarelli, Director of Fieldwork and Doctoral Capstone Coordinator for the Entry-Level OTD Program, and Assistant Professor of Clinical Occupational Therapy at the University of Southern California (USC), agreed with uncoupling Level I and Level II students when considering supervision limitations. Ms. Mannarelli added that a student could be Level I for as short as one to five days during an entire semester.

Chair Miller asked Ms. Mannarelli how many students USC typically sent out to one fieldwork site.

Ms. Mannarelli replied that USC usually sent two to three students to one fieldwork site. Some sites will host Level I students, Level II students, and Doctoral capstone students without jeopardizing the quality of care to the patients/clients. Ms. Mannarelli expressed concern that if a fieldwork site hosted three Level II students, they could not host any Level I students.

The committee discussed defining the clinical experience, as not all clinical experiences look the same across the education programs. At a fieldwork site, doctoral capstone students could spend more time supporting a Level II student while Level I students observed.

A recommendation was made to consider not having supervision limitations applied to Level I students. At Level I, the students are gaining exposure to the patient population. They are not expected to put their hands on a patient. The observation of Level I students can be varied allowing for more flexibility. At times, other healthcare professionals oversee the Level I students. However, it was pointed out that the experience of a Level I student could vary as it was not in writing. Level I fieldwork students could participate in terms of engaging with a patient/client in other ways.

The consensus of the committee regarding the language in Section 4181(e)(2) was to remove the phrase, "at any one time" and to add "no more than" before Level I fieldwork students, Level II fieldwork students, and Doctoral capstone students. There was a brief discussion regarding Section 4181(e)(1) and moving it to subsection (e)(3).

Ms. Stack expressed the need to clarify what the supervision of a Level I fieldwork student entailed, for example, should the supervisor need to be in the student's line of sight or was being accessible enough?

Taking the word "clinical" out of 4180(e)(2) and adding "engaged in patient/client care" and taking the number "twenty" out of 4180(e)(3) was suggested.

The idea that it should be the responsibility of the practitioner to decide when they are supervising too many students as opposed to the Board making that decision for the practitioner was discussed.

Kristen Neville, State Affairs Manager at American Occupational Therapy Associate, added that no study has identified the perfect number of students for a practitioner to supervise.

The Committee agreed to add language to 4180(e) that read, “no more than a total of three Level I fieldwork students directly engaged in client-related tasks.”

7. Review of CCR Title 16, Division 39, to identify other sections possibly affected by proposed amendments to CCR Sections 4180 and 4181 and recommend proposed regulatory amendment(s) to the Board to ensure consistency.

*This agenda item was tabled until the next meeting.*

8. Discussion on the need for a future meeting.

The Committee agreed to meet on September 25<sup>th</sup> and was optimistic that they would be ready to vote on the proposed language for Sections 4180 and 4181 during that meeting.

9. New suggested agenda items for a future meeting.

*This agenda item was tabled until the next meeting.*

**The meeting adjourned at 9:53 a.m.**

## **AGENDA ITEM 6**

**REVIEW AND VOTE ON APPROVAL OF THE SEPTEMBER 25, 2024, COMMITTEE MEETING MINUTES.**





**\*\* DRAFT \*\***

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

**September 25, 2024**

### **Committee Members Present**

Denise Miller, Chair/Board Member  
 Cesar Arada  
 Ada Boone Hoerl  
 Candace Chatman  
 Domenique Hendershot-Embrey  
 Joyce Fries  
 Heather Kitching  
 Kersten Laughlin  
 Sharon Pavlovich  
 Terry Peralta-Catipon  
 Liz Phelps  
 Samia Rafeedie  
 Penny Stack

### **Board Staff Present**

Heather Martin, Executive Officer  
 Rachael Hutchison, Manager  
 Austin Porter, Analyst

### **Committee Members Absent**

Beata Morcos, Board Vice President  
 Erin Schwier  
 Jessica Padilla  
 July McLaughlin Gray

**Wednesday, September 25, 2024**

**8:00 am – Committee Meeting**

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

The meeting was called to order at 8:06 a.m., roll was called and a quorum was established.

2. Committee Chair’s Opening Remarks.

Chair Denise Miller welcomed everyone in attendance. Ms. Miller announced that the committee is developing language for the board to consider regarding supervision standards. The Committee has been focused on defining different levels of students and fieldwork, as well as, discussing supervision ratios. The goal is to reach a consensus and vote on the language before the November board meeting.

3. Introductions by all Committee members.

The committee members chose not to introduce themselves.

4. Public Comment for Items Not on the Agenda.

There were no comments for items not on the agenda.

5. Review and vote on approval of the September 17, 2024, Committee meeting highlights.

*This item was informational only. Meeting minutes will be provided at the next meeting.*

6. Consideration and possible recommendation to the Board on amending California Code of Regulations (CCR), Title 16, Division 39, Article 9, Section 4180, Definitions, and Section 4181, Supervision Parameters.

The board changed the maximum number of fieldwork students that could be supervised by an occupational therapist from two to three based on feedback and input from AOTA, OTAC, and public comments.

There was discussion about the wording and clumping of the different types of fieldwork students, and it was ultimately agreed that the current proposed language is reasonable.

There was a suggestion to include language that allowed for exceptions to the maximum number of fieldwork students if approved by the board, however, a process to be approved by the Board does not exist at this time. The Board must detail what that process would look like in its regulations. The committee agreed to add the language "except as approved by the Board" after the language, "no more than a total of three" in Section 4181(e).

An attendee asked for clarification regarding, "no more than three" and it was explained that the limit is a total of three students of any combination or category.

Another attendee noted that Level I students could be supervised by someone other than an occupational therapist or occupational therapy assistant, and those individuals are not subject to the supervision limitations established by the Board.

It was added that in non-occupational therapy settings, a Level I could be about the exposure to populations and methods of interactions, in short, it would be more of an observational activity. Level I students could also help their supervising occupational therapist or occupational therapy assistant set something up for their session, which would not be considered a skilled service, and the primary intention would still be the exposure to a population and their needs.

The Board's law only mentions "accredited" programs, while the Committee's proposed regulatory language mentions "pre-accredited" and "candidacy status." However, the regulatory language cannot be broader than the law, but there might be potential for a bill to change the definition. The committee would consider revising the language to match the law.

The Committee discussed the language in Section 4181(g)(2) regarding the supervision of Level I fieldwork students by occupational therapists. Suggested phrases included, "strictly observational," "solely observational," or "exclusively observational."

It was pointed out that students could observe in one session and support in another and that there never would be an exclusively observational Level I student. To that extent, the Committee discussed the relevance of keeping 4181(g)(2). Ultimately, the consensus was to keep Section 4181(g)(2).

The Committee discussed adding, “at any one time,” back into Section 4181(e)(1). After they had agreed to add the phrase, “engaged in client-related tasks,” the phrase, “at any one time became necessary.

Concerning Section 4181(g)(2), a suggestion was made to remove the word “observing” as it was too specific and replace it with the phrase, “Level I fieldwork students that are not engaged in direct patient/client care.”

The Committee deliberated on using the words, “accredited,” “pre-accredited,” and “candidacy status.” The members were reminded that the definition of “student” that the Committee previously agreed upon included those terms. However, it was pointed out that the statutory language only mentions, “accredited,” and the regulations cannot be broader than the laws. A bill would need to be introduced to include “pre-accredited” and “candidacy status” in the law. Therefore, the Committee agreed to bring two versions of the definition of “student” before the Board, one with the terms “pre-accredited” and “candidacy status” and one without.

The consensus was to make both sections gender-neutral by using the terms, “they” and “them.”

The consensus was to omit the phrases, “occupational therapy” to “occupational therapist,” throughout the definitions in Section 4180(b), (c), and (d), as those are mentioned in the definition of “student.”

The Committee then defined the Level I fieldwork student as, “participation in activities designed to introduce the student to fieldwork, apply knowledge to practice, and develop an understanding of the needs of clients.”.

The Committee then defined the Level II fieldwork student as “participation in delivering occupational therapy services, under the direct supervision of a licensee, to clients with the goal of developing competent, entry-level practitioners.

The Committee agreed to propose new language for Section 4181(d) regarding supervision by occupational therapy assistants as follows:

*(d) Occupational therapy assistants may supervise doctoral capstone students completing an experience in research skills, administration, leadership, program and policy development, advocacy, or education, as required by an accredited educational program and no more than a total of three:*

- (1) Aides providing non-client related tasks. ;*
- (2) Level I fieldwork students directly engaged in client-related tasks or patient/client care;*
- (3) Level II fieldwork students, at any one time;*

*(4) Doctoral capstone students completing a clinical, direct patient/client care experience, at any one time;*

*(5) Occupational therapist limited permit holders, at any one time; and*

*(6) Occupational therapy assistant limited permit holders, at any one time.*

Chair Miller noted that the Committee would be provided with language that incorporated their discussions that day at the next meeting and that all highlights and minutes would be brought back from the previous meetings that needed to be voted on.

There were no additional Committee member remarks.

There were no additional public comments.

7. Review of CCR Title 16, Division 39, to identify other sections possibly affected by proposed amendments to CCR Sections 4180 and 4181 and recommend proposed regulatory amendment(s) to the Board to ensure consistency.

*This agenda item was tabled for a future meeting.*

8. Discussion on the need for a future meeting.

The Committee agreed to meet again in mid-October.

**Meeting adjournment 10:02 a.m.**

## **AGENDA ITEM 7**

### **CONSIDERATION AND POSSIBLE RECOMMENDATION TO THE BOARD ON AMENDING CALIFORNIA CODE OF REGULATIONS (CCR), TITLE 16, DIVISION 39, ARTICLE 9, SECTION 4180, DEFINITIONS, AND SECTION 4181, SUPERVISION PARAMETERS.**

The following attached for review:

- Proposed Text for Sections 4180 and 4181
- Business and Professions Code Sections 2570.2, 2570.3, 2570.4, and 2570.6

CCR, Title 16 Professional and Vocational Regulations  
Division 39. California Board of Occupational Therapy  
**Article 9. Supervision Standards**

<b>Legend:</b>	Added text is indicated with an <u>underline</u> . Deleted text is indicated by <del>strikeout</del> .
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**Amend section 4180 to read as follows:**

**§ 4180. Definitions**

In addition to the definitions found in Business and Professions Code sections 2570.2, and 2570.3, **2570.4, and 2570.6**, the following terms are used and defined herein:

(a) ~~"Client related tasks" means tasks performed as part of occupational therapy services rendered directly to the client.~~ **"Accredited" means an entry-level occupational therapy degree program accredited by the Accreditation Council for Occupational Therapy Education (ACOTE), or an entry-level degree program with candidacy status or pre-accreditation status with ACOTE.**

(b) **"Student" means an individual enrolled in an accredited entry-level occupational therapy or occupational therapy assistant degree program.**

(b) (c) ~~"Level I fieldwork student" means an occupational therapy or occupational therapy assistant student participating~~ **participation** in activities designed to introduce ~~him or her~~ **the student** to fieldwork experiences, **apply knowledge to practice**, and develop an understanding of the needs of clients.

(c) (d) ~~"Level II fieldwork student" means an occupational therapy or occupational therapy assistant student participating~~ **participation** in delivering occupational therapy services, **under the direct supervision of a licensee**, to clients with the goal of developing competent, entry-level practitioners.

(e) **"Entry-level doctoral capstone student" means an occupational therapist student completing a doctoral capstone project and experience.**

(f) **"Supervision of an entry-level doctoral capstone experience" means the (mentorship OR oversight) of the student when completing a direct patient/client care experience.**

(g) **"Faculty-led fieldwork" means a fieldwork completed in direct in-sight supervision of a licensed occupational therapist or occupational therapy assistant employed by a California educational institution.**

(h) **"Client related tasks" means tasks performed as part of occupational therapy services rendered directly to the client.**

(d) (i) ~~"Non-client related tasks" means clerical, secretarial and administrative activities; transportation of patients/clients; preparation or maintenance of treatment equipment~~

and work area; taking care of patient/client personal needs during treatments; and assisting in the construction of adaptive equipment and splints.

(e) (i) "Periodic" means at least once every 30 days.

## **Amend section 4181 to read as follows:**

### **§ 4181. Supervision Parameters**

(a) Appropriate supervision of an occupational therapy assistant includes, at a minimum:

(1) The weekly review of the occupational therapy plan and implementation and periodic onsite review by the supervising occupational therapist. The weekly review shall encompass all aspects of occupational therapy services and be completed by telecommunication or onsite.

(2) Documentation of the supervision, which shall include either documentation of direct client care by the supervising occupational therapist, documentation of review of the client's medical and/or treatment record and the occupational therapy services provided by the occupational therapy assistant, or co-signature of the occupational therapy assistant's documentation.

(3) The supervising occupational therapist shall be readily available in person or by telecommunication to the occupational therapy assistant at all times while the occupational therapy assistant is providing occupational therapy services.

(4) The supervising occupational therapist shall provide periodic on-site supervision and observation of client care rendered by the occupational therapy assistant.

(b) The supervising occupational therapist shall at all times be responsible for all occupational therapy services provided by an occupational therapy assistant, a limited permit holder, a student or an aide. The supervising occupational therapist has continuing responsibility to follow the progress of each client, provide direct care to the client, and assure that the occupational therapy assistant, limited permit holder, student or aide do not function autonomously.

(c) The level of supervision for all personnel is determined by the supervising occupational therapist whose responsibility it is to ensure that the amount, degree, and pattern of supervision are consistent with the knowledge, skill and ability of the person being supervised.

~~(d) Occupational therapy assistants may supervise:~~

~~(1) Level I occupational therapy students;~~

~~(2) Level I and Level II occupational therapy assistant students; and~~

~~(3) Aides providing non-client related tasks.;~~

**(d) Occupational therapist assistants may supervise no more than a total of three of the following:**

**(1) Aides providing non-client related tasks.;**

**(2) Level I fieldwork students directly engaged in client-related tasks or patient/client care;**

**(3) Level II fieldwork students, at any one time;**

**(4) Doctoral capstone students completing a clinical, direct patient/client care experience, at any one time;**

**(5) Occupational therapist limited permit holders, at any one time; and**

**(6) Occupational therapy assistant limited permit holders, at any one time.**

**(e) Occupational therapy assistants may supervise doctoral capstone students completing an experience in research skills, administration, leadership, program and policy development, advocacy, or education.**

**(f) Occupational therapists may supervise **no more than a total of three** of the following:**

**(1) Level I fieldwork students directly engaged in client-related tasks or patient/client care;**

**(2) Level II fieldwork students, at any one time;**

**(3) Doctoral capstone students completing a clinical, direct patient/client care experience, at any one time;**

**(4) Occupational therapist limited permit holders, at any one time;**

**(5) Occupational therapy assistant limited permit holders, at any one time; and**

**(6) Occupational therapy assistants.**

**(g) Occupational therapists may supervise no more than 20 Level I fieldwork students in a faculty-led fieldwork, at any one time.**

**(h) Without limitation, occupational therapists may supervise:**

**(1) Doctoral capstone students completing an experience in research skills, administration, leadership, program and policy development, advocacy, and education, as required by an accredited educational program; and**

**(2) Level I fieldwork students exclusively in an observational role or providing non-client related tasks.**

**(i) An occupational therapist who can demonstrate adequate supervision to ensure safety, may request the Board provide an exception to the maximum number of those supervised, as specified in subsection (e).**

**(e) (j) The supervising occupational therapist shall determine that the occupational therapy practitioner possesses a current license or permit to practice occupational therapy prior to allowing the person to provide occupational therapy services, **education, supervision, and practice**. (Re-visit verbiage)**

*Additional resources/information on next page*



## CA LAWS AND REGULATIONS

### Business and Professions Code (BPC)

#### **BPC Section 2570.2(h)**

“Occupational therapist” means an individual ... licensed pursuant to the provisions of this chapter and whose license is in good standing....

#### **BPC Section 2570.2(i)**

“Occupational therapy assistant” means an individual ... licensed pursuant to the provisions of this chapter, who is in good standing ... and who works under the appropriate supervision of a licensed occupational therapist.

#### **BPC Section 2570.2(i)**

“Good standing” means a person who has a **current, valid license** to practice occupational therapy or assist in the practice of occupational therapy.

#### **CCR section 4170(h)(1):**

(h) Occupational therapy practitioners shall comply with the Occupational Therapy Practice Act, the California Code of Regulations, ... and shall comply with the following:  
(1) Practice occupational therapy **only when holding a current and valid license** issued by the Board...

### DEFINITIONS IN 2023 ACOTE STANDARDS:

**Mentoring:** A relationship between two people in which one person (the mentor) is dedicated to the personal and professional growth of the other (the mentee). A mentor has more experience and knowledge than their mentee.

**Professional Practice:** Professional practice includes all potential roles of an occupational therapy practitioner such as clinician, educator, researcher, consultant, administrator, etc.

**Supervise:** To direct and inspect the performance of workers or work.

**Supervisor:** One who ensures that tasks assigned to others are performed correctly and efficiently.

### ACOTE STANDARDS WHICH MENTION A LICENSE IS REQUIRED:

**A.2.1.** Program Director

**A.2.3.** Academic Fieldwork Coordinator

**A.2.4.** Doctoral Capstone Coordinator

**A.2.5.** OT and OTA Faculty License and Faculty Degrees

**C.1.10.** Qualified Level I Fieldwork Educators

**C.1.13.** Qualified Level II Fieldwork Educators

**C.1.16.** Fieldwork Supervision Where No OT Services Exist

## **Business and Professions Code Section 2570.2**

As used in this chapter, unless the context requires otherwise:

- (a) "Appropriate supervision of an aide" means that the responsible occupational therapist or occupational therapy assistant shall provide direct in-sight supervision when the aide is providing delegated client-related tasks and shall be readily available at all times to provide advice or instruction to the aide. The occupational therapist or occupational therapy assistant is responsible for documenting the client's record concerning the delegated client-related tasks performed by the aide.
- (b) "Aide" means an individual who provides supportive services to an occupational therapist or occupational therapy assistant and who is trained by an occupational therapist or occupational therapy assistant to perform, under appropriate supervision, delegated, selected client and nonclient-related tasks for which the aide has demonstrated competency. An occupational therapist or occupational therapy assistant licensed pursuant to this chapter may utilize the services of one aide engaged in client-related tasks to assist the occupational therapist or occupational therapy assistant in the practice of occupational therapy. The occupational therapist shall be responsible for the overall use and actions of the aide.
- (c) "Association" means the Occupational Therapy Association of California or a similarly constituted organization representing occupational therapists in this state.
- (d) "Board" means the California Board of Occupational Therapy.
- (e) "Continuing competence" means a dynamic and multidimensional process in which the occupational therapist or occupational therapy assistant develops and maintains the knowledge, performance skills, interpersonal abilities, critical reasoning, and ethical reasoning skills necessary to perform current and future roles and responsibilities within the profession.
- (f) "Examination" means an entry level examination for occupational therapists and occupational therapy assistants administered by the National Board for Certification in Occupational Therapy or by another nationally recognized credentialing body.
- (g) "Good standing" means that the person has a current, valid license to practice occupational therapy or assist in the practice of occupational therapy and has not been disciplined by the recognized professional licensing or standard-setting body within five years prior to application or renewal of the person's license.
- (h) "Occupational therapist" means an individual who meets the minimum education requirements specified in Section 2570.6 and is licensed pursuant to the provisions of this chapter and whose license is in good standing as determined by the board to practice occupational therapy under this chapter. The occupational therapist is responsible for and directs the evaluation process and develops the intervention plan.
- (i) "Occupational therapy assistant" means an individual who is licensed pursuant to the provisions of this chapter, who is in good standing as determined by the board, and based thereon, who is qualified to assist in the practice of occupational therapy under this chapter, and who works under the appropriate supervision of a licensed occupational therapist.
- (j) "Occupational therapy services" means the services of an occupational therapist or the services of an occupational therapy assistant under the appropriate supervision of an occupational therapist.

(k) "Person" means an individual, partnership, unincorporated organization, or corporation.

(l) "Occupational therapy" means the therapeutic use of purposeful and meaningful goal-directed activities (occupations) with individuals, groups, populations, or organizations, to support participation, performance, and function in roles and situations in home, school, workplace, community, and other settings. Occupational therapy services are provided for habilitation, rehabilitation, and the promotion of health and wellness for clients with disability- and nondisability-related needs or to those who have, or are at risk of developing, health conditions that limit activity or cause participation restrictions. Occupational therapy services encompass occupational therapy assessment, treatment, education, and consultation. Occupational therapy addresses the physical, cognitive, psychosocial, sensory-perception and other aspects of performance in a variety of contexts and environments to support engagement in occupations that affect physical and mental health, well-being, and quality of life. Occupational therapy assessment identifies performance abilities and limitations that are necessary for self-maintenance, learning, work, and other similar meaningful activities. Occupational therapy treatment is focused on developing, improving, or restoring functional daily living skills, compensating for and preventing dysfunction, or minimizing disability. Through engagement in everyday activities, occupational therapy promotes mental health by supporting occupational performance in people with, or at risk of experiencing, a range of physical and mental health disorders. Occupational therapy techniques that are used for treatment involve teaching activities of daily living (excluding speech-language skills); designing or fabricating orthotic devices, and applying or training in the use of assistive technology or orthotic and prosthetic devices (excluding gait training). Occupational therapy consultation provides expert advice to enhance function and quality of life. Consultation or treatment may involve modification of tasks or environments to allow an individual to achieve maximum independence. Services are provided individually, in groups, or populations.

(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.

(n) "Physical agent modalities" means techniques that produce a response in soft tissue through the use of light, water, temperature, sound, or electricity. These techniques are used as adjunctive methods in conjunction with, or in immediate preparation for, occupational therapy services.

### **Business and Professions Code Section 2570.3**

(a) A person shall not practice occupational therapy or hold themselves out as an occupational therapist or as being able to practice occupational therapy, or to render occupational therapy services in this state unless the person is licensed as an occupational therapist under the provisions of this chapter. A person shall not hold themselves out as an occupational therapy assistant or work as an occupational

therapy assistant under the supervision of an occupational therapist unless the person is licensed as an occupational therapy assistant under this chapter.

(b) Only an individual may be licensed under this chapter.

(c) This chapter does not authorize an occupational therapist to practice physical therapy, as defined in Section 2620; speech-language pathology or audiology, as defined in Section 2530.2; nursing, as defined in Section 2725; psychology, as defined in Section 2903; marriage and family therapy, as defined in Section 4980.02; clinical social work, as defined in Section 4996.9; professional clinical counseling, as defined in Section 4999.20; educational psychology, as defined in Section 4989.14; or spinal manipulation or other forms of healing, except as authorized by this section.

(d) An occupational therapist may provide advanced practices if the occupational therapist has the knowledge, skill, and ability to do so and has demonstrated to the satisfaction of the board that the occupational therapist has met educational training and competency requirements. These advanced practices include the following:

(1) Hand therapy.

(2) The use of physical agent modalities.

(3) Swallowing assessment, evaluation, or intervention.

(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.

(f) An occupational therapist using physical agent modalities 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 and physiology of muscle, sensory, vascular, and connective tissue in response to the application of physical agent modalities.

(2) Principles of chemistry and physics related to the selected modality.

(3) Physiological, neurophysiological, and electrophysiological changes that occur as a result of the application of a modality.

(4) Guidelines for the preparation of the client, including education about the process and possible outcomes of treatment.

(5) Safety rules and precautions related to the selected modality.

(6) Methods for documenting immediate and long-term effects of treatment.

(7) Characteristics of the equipment, including safe operation, adjustment, indications of malfunction, and care.

(g) An occupational therapist in the process of achieving the education, training, and competency requirements established by the board for providing hand therapy or using physical agent modalities may practice these techniques under the supervision of an

occupational therapist who has already met the requirements established by the board, a physical therapist, or a physician and surgeon.

(h) The board shall develop and adopt regulations regarding the educational training and competency requirements for advanced practices in collaboration with the Speech-Language Pathology and Audiology and Hearing Aid Dispensers Board, the Board of Registered Nursing, and the Physical Therapy Board of California.

(i) This chapter does not authorize an occupational therapist to seek reimbursement for services other than for the practice of occupational therapy as defined in this chapter.

(j) "Supervision of an occupational therapy assistant" means that the responsible occupational therapist shall at all times be responsible for all occupational therapy services provided to the client. The occupational therapist who is responsible for appropriate supervision shall formulate and document in each client's record, with the occupational therapist's signature, the goals and plan for that client, and shall make sure that the occupational therapy assistant assigned to that client functions under appropriate supervision. As part of the responsible occupational therapist's appropriate supervision, the occupational therapist shall conduct at least weekly review and inspection of all aspects of occupational therapy services by the occupational therapy assistant.

(1) The supervising occupational therapist has the continuing responsibility to follow the progress of each client, provide direct care to the client, and to ensure that the occupational therapy assistant does not function autonomously.

**(2) An occupational therapist shall not supervise more occupational therapy assistants, at any one time, than can be appropriately supervised in the opinion of the board. Three occupational therapy assistants shall be the maximum number of occupational therapy assistants supervised by an occupational therapist at any one time, but the board may permit the supervision of a greater number by an occupational therapist if, in the opinion of the board, there would be adequate supervision and the public's health and safety would be served. In no case shall the total number of occupational therapy assistants exceed three times the number of occupational therapists regularly employed by a facility at any one time.**

#### **Business and Professions Code Section 2570.4**

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

(a) Any person licensed or otherwise recognized in this state by any other law or regulation when that person is engaged in the profession or occupation for which he or she is licensed or otherwise recognized.

(b) Any person pursuing a supervised course of study leading to a degree or certificate in occupational therapy at an accredited educational program, if the person is designated by a title that clearly indicates his or her status as a student or trainee.

(c) Any person fulfilling the supervised fieldwork experience requirements of subdivision (c) of Section 2570.6, if the experience constitutes a part of the experience necessary to meet the requirement of that provision.

(d) Any person performing occupational therapy services in the state if all of the following apply:

BPC Sections 2570.2, 2570.3, 2570.4, and 2570.6

- (1) An application for licensure as an occupational therapist or an occupational therapy assistant has been filed with the board pursuant to Section 2570.6 and an application for a license in this state has not been previously denied.
  - (2) The person possesses a current, active, and nonrestricted license to practice occupational therapy under the laws of another state that the board determines has licensure requirements at least as stringent as the requirements of this chapter.
  - (3) Occupational therapy services are performed in association with an occupational therapist licensed under this chapter, and for no more than 60 days from the date on which the application for licensure was filed with the board.
- (e) Any person employed as an aide subject to the supervision requirements of this section.

## **Business and Professions Code Section 2570.6**

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

- (a) That the applicant is in good standing and has not committed acts or crimes constituting grounds for denial of a license under Section 480.
- (b) (1) That the applicant has successfully completed the academic requirements of an educational program for occupational therapists or occupational therapy assistants that is approved by the board and accredited by the American Occupational Therapy Association's Accreditation Council for Occupational Therapy Education (ACOTE), or accredited or approved by the American Occupational Therapy Association's (AOTA) predecessor organization, or approved by AOTA's Career Mobility Program.
  - (2) The curriculum of an educational program for occupational therapists shall contain the content required by the ACOTE accreditation standards, or as approved by AOTA's predecessor organization, or as approved by AOTA's Career Mobility Program.
- (c) (1) For an applicant who is a graduate of an occupational therapy or occupational therapy assistant educational program who is unable to provide evidence of having met the requirements of paragraph (2) of subdivision (b), he or she may demonstrate passage of the examination administered by the National Board for Certification in Occupational Therapy, the American Occupational Therapy Certification Board, or the American Occupational Therapy Association, as evidence of having successfully satisfied the requirements of paragraph (2) of subdivision (b).
  - (2) For an applicant who completed AOTA's Career Mobility Program, he or she shall demonstrate participation in the program and passage of the examination administered by the National Board for Certification in Occupational Therapy, the American Occupational Therapy Certification Board, or the American Occupational Therapy Association, as evidence of having successfully satisfied the requirements of paragraphs (1) and (2) of subdivision (b).
- (d) That the applicant has successfully completed a period of supervised fieldwork experience approved by the board and arranged by a recognized educational institution where he or she met the academic requirements of subdivision (b) or (c) or arranged by a nationally recognized professional association. The fieldwork requirements for

applicants applying for licensure as an occupational therapist or certification as an occupational therapy assistant shall be consistent with the requirements of the ACOTE accreditation standards, or AOTA's predecessor organization, or AOTA's Career Mobility Program, that were in effect when the applicant completed his or her educational program.

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

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