

## POLICY AND ADVOCACY COMMITTEE MINUTES

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A recorded webcast of this meeting is available at:  
[https://www.youtube.com/watch?v=O1YEiuhn\\_lg](https://www.youtube.com/watch?v=O1YEiuhn_lg)

**DATE** January 19, 2024

**TIME** 1:00 p.m.

### LOCATIONS

**Primary Location** Department of Consumer Affairs  
1625 North Market Blvd., @S-102  
Sacramento, CA 95834

**Alternative Platform** WebEx Video/Phone Conference

### ATTENDEES

#### Members Present at Remote Locations

Christopher Jones, Chair, LEP Member  
Wendy Strack, Chair, Public Member  
Abigail Ortega, LCSW Member  
John Sovec, LMFT Member

#### Staff Present at Primary Location

Steve Sodergren, Executive Officer  
Rosanne Helms, Legislative Manager  
Christy Berger, Regulatory Analyst  
Christina Kitamura, Administrative Analyst

#### Staff Present at Remote Location

Sabina Knight, Legal Counsel  
Kristy Schieldge, Legal Counsel  
Marlon McManus, Assistant Executive Officer

**Other Attendees** Public participation via WebEx video conference/phone conference  
and in-person at Department of Consumer Affairs

1 **1. Call to Order and Establishment of Quorum**

2  
3 Christopher Jones, Chair of the Policy & Advocacy Committee (Committee)  
4 called the meeting to order at 1:00 p.m. Roll was called, and a quorum was  
5 established.

6  
7 **2. Introductions**

8  
9 Committee members introduced themselves during role call; staff and public  
10 attendees introduced themselves.

11  
12 **3. Consent Calendar: Discussion and Possible Approval of October 27, 2023**  
13 **Committee Meeting Minutes**

14  
15 Motion: Approve the October 27, 2023 Committee meeting minutes.

16  
17 M/S: Strack/Jones

18  
19 Public Comment: None

20  
21 Motion carried: 3 yea, 0 nay 1 abstention.

22

Member	Vote
Christopher Jones	Yes
Abigail Ortega	Abstain
John Sovec	Yes
Wendy Strack	Yes

23  
24 **4. Discussion and Possible Recommendations Regarding Licensing**  
25 **Requirements for Licensed Educational Psychologists (Business and**  
26 **Professions Code (BPC) §4989.20)**

27  
28 Staff presented language for potential amendments to the licensing requirements  
29 for licensed educational psychologists (LEP) in the Business and Professions  
30 Code.

31  
32 **1. Specifying Required Hours of Experience**

33  
34 Discussion/Comments

35 Jones: Two years of full-time experience is the best way to measure the  
36 experience for a school psychologist because of the way that the job is  
37 structured. The 1200-hour requirement for the internship program is based  
38 upon the number of hours that typical school psychologist works in a school  
39 year. Furthermore, school psychologists must show competencies in specific  
40 “domains” versus overall competency; unsure if there is a specified number of  
41 hours required for each domain – may need to look at this.

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Sovec: In favor of moving towards a more specific requirement.

Jana Parker: Agrees that hours can get confusing even when they are tracking hours for supervision for the credential. It is a requirement to work in public schools for 2 years, which is the easiest way to track. Perhaps the language could state “a full school year” instead of “a year.”

Dr. Kristin Makena, California Association of School Psychologists (CASP): In agreement with the language proposed. CASP supports alignment with other BBS licenses as well as recognizing that employment in school districts, charter and private schools may vary. The language aligns with the credential requirements. CASP agrees with this change because the concern is that in one year, an individual may work part time and not fulfill the 1200 hours. As for “domains,” there is a percentage for each, but it’s equal for each of the 10 domains.

Jones: Requested to look at the domain percentages and continue that discussion.

Kristy Schieldge: (to Jones) suggested that he ask staff to provide the regulations for the California Commission on Teacher Credentialing to determine how they are counting hours of experience, and what it is requiring the public sector. Staff and the Committee will need to explore defining a school year and how that’s calculated, and whether it’s daily requirements or a percentage of the year.

Sovec: Suggested that the regulations address private schools and other institutions and determine how to calculate experience from those institutions.

Jones: Explained that the difficulty is breaking the job down to hours because school psychologists are not technically under supervision while working as a credentialed school psychologist; they work in teams. The question is who would sign off on those hours.

Sovec: Teacher credentialing is already using clock hours. More research should be done to determine how to use this system, how to apply it and verify it.

Christy Berger: Added that calculating hours for an individual who has multiple jobs at various time bases will complicate it even more if we continue to use the term “or the equivalent to full time.” This will be very challenging for the applicant who has a lot of part-time experience if we went to this time-based situation.

1                   **2. Clarifying Requirements for In-State Versus Out-of-State School**  
2                   **Psychologists**

3  
4                   Discussion/Comments

5                   Jones: In favor of this amendment.

6  
7                   Makena, CASP: Agrees with the amendment; only concern is defining  
8                   who that supervisor could be.

9  
10                  Jana Parker: In favor of the amendment. Concerns: 1) A licensed  
11                  psychologist may not be familiar with many issues that educational  
12                  psychologist deal with in public schools, such as education code. 2) A  
13                  school psychologist in a parochial school may not deal with education  
14                  code. 3) Training in parochial schools may not be the same as training in  
15                  public schools.

16  
17                  **3. Adding an Age Limit to a Passing Score on the LEP Exam**

18  
19                  Discussion/Comments

20                  Jones: In favor of adding an age limit to 7 years.

21  
22                  Direction: Continue having discussions on items 1 and 2 and bring it back to  
23                  Committee.

24  
25                  **5. Discussion and Possible Recommendations Regarding the Board’s Retired**  
26                  **License Requirements (BPC §§ 4984.41, 4989.45, 4997.1, 4999.113)**

27  
28                  The Committee discussed whether amendments to the Board’s retired license  
29                  requirements reduce barriers to reactivate a license. Possible amendments were  
30                  presented and include the following:

- 31
- 32                  • Require the license to be unrestricted (no discipline). Currently, a license  
33                  must be current and active or in “inactive” status. If a license is expired,  
34                  one must reactivate the license in order to retire it.
  - 35                  • Extend the amount of time that a retired license can be restored without  
36                  reapplying for licensure and passing both exams. Currently, the time  
37                  frame is 3 years from the date the license was retired.
  - 38                  • Allowing a retired licensee to practice in certain settings, such as in an  
39                  exempt setting or “free-of-charge.”
  - 40                  • Allowing a retired licensee to have a “supervision only” status.

41  
42                  Staff also presented the Board of Registered Nursing’s (BRN) new retired license  
43                  program:  
44

- 1           • The nurse must hold an unrestricted license on the date of retired license  
2           application.
- 3           • A retired licensee may provide free nursing services in any public health  
4           program created by federal, state, or local law or administered by a  
5           federal, state, county, or local government entity, under the supervision of  
6           a licensee.
- 7           • Retired licensees are exempt from continuing education requirements.
- 8           • The fee for a retired license must be established at no less than one-half  
9           of the regular renewal fee.
- 10          • A retired license may be reinstated to an active status one time only.

11  
12          To reinstatement a retired nursing license to active status, the retired licensee  
13          must complete the requirements to renew a license, including providing  
14          fingerprints, and paying any required renewal fees, and one of the following:

- 15  
16          • If retired 8 years or less, have completed 30 hours of continuing  
17          education in the past 2 years.
- 18          • If retired more than 8 years, they must either hold a current valid active  
19          and clear registered nurse license in another state or U.S. territory, or  
20          Canada; or pass the current licensure exam.

21  
22          Discussion/Comments

23          Dr. Ben Caldwell: Expressed concern regarding individuals reactivating their  
24          licenses after having been retired for a long period of time, not current on what is  
25          happening in the field and returning to practice.

26  
27          Cathy Atkins, California Association of Marriage and Family Therapists (CAMFT):  
28          Expressed concerns regarding reactivation of retired licensees: 1) being out of  
29          the practice for a long period of time and not having continuing education during  
30          that period. 2) "Working under supervision" needs to be clarified.

31  
32          The Committee directed staff to draft language for further discussion, focusing on  
33          the BRN model, focusing on the 1<sup>st</sup> bullet (holding an unrestricted license) and  
34          the last bullet (retired license may be reinstated to an active status one time  
35          only), and the reinstatement language.

36

1 **6. Discussion and Possible Recommendations Regarding Advertising and**  
2 **Other Disclosure Requirements in Statutes and Regulations (Title 16 of the**  
3 **California Code of Regulations (CCR) §§1811 and 1880; and BPC §§4980.03,**  
4 **4980.44, 4980.48, 4989.49, 4992.2, 4996.15, 4996.18, 4999.12, 4999.36,**  
5 **4999.46.1**  
6

7 At its October 2023 meeting, the Committee discussed the Board’s advertising  
8 laws and client disclosure laws and was presented research pertaining to  
9 advertising laws in other states and at other DCA boards. It directed staff to  
10 make changes to the following:

- 11 1. Advertising Regulations (Title 16 CCR §1811)
- 12 2. Statute for Associates (BPC §§4980.44, 4996.18, 2999.46.1)
- 13 3. Statute for Trainees/Interns (Title 16 CCR 1880 and BPC §§4980.48,  
14 4996.15, 4999.36)
- 15 4. Amendment of Advertising Definition (BPC §§4980.03, 4989.49, 4992.2,  
16 4999.12)
- 17
- 18

19 This proposal will require that the Board pursue changes to both statute and  
20 regulations, ideally with both becoming effective at the same time.

21 **1. Advertising Regulations**  
22

23 The Board’s regulatory counsel suggested that the Committee discuss this  
24 further. A nickname can be used but it must not be false, fraudulent, or  
25 misleading, and the advertisement must contain the name as filed with the  
26 Board. Recommended expanding the language to require the nickname  
27 immediately follow or in proximity to the full required name. Kristy  
28 Schieldge provided greater explanation behind her suggestion.  
29

30 Discussion/Comments  
31

32 Extensive discussion regarding took place between Ms. Schieldge and the  
33 Committee regarding legal verbiage, clarification and interpretation of law,  
34 and potential language.  
35

36 Jones: Feels that stopping at BPC §651 is sufficient.  
37

38 Caldwell: 1) Having a nickname that complies with BPC §651 seems  
39 sufficient. Asked if we are changing something that does not need to be  
40 changed. 2) “Proximity” is difficult to manage. Agrees with ending it after  
41 BPC §651 but not sure that it changes anything substantive.  
42

43 GV Ayers, California Association for Licensed Professional Clinical  
44 Counselors (CALPCC): Suggested an amendment to 16 CCR §1811(g)  
45 by adding to the beginning “In addition to the information required in (a),”

1 and strike “(2) The full name as filed with the board is also included in that  
2 advertisement.” He added that there is nothing to be gained by proximity.

3  
4 Atkins, CAMFT: Requested that the Committee take a “common sense  
5 approach” to ensure that the average consumer can make the connection  
6 from a nickname to the full name as filed with the Board, and to avoid  
7 unintended consequences.

8  
9 The Committee directed staff to revise the text and bring it to the next  
10 Committee meeting.

11  
12 **2. Statute for Associates**

13  
14 Discussion/Comment

15 Sovec: §4999.46.1(c) “All applicants and registrants shall inform each  
16 client or patient **before performing** any professional services...”  
17 Suggested “initiating” instead of “performing.”

18  
19 Caldwell: Supports changes to §4980.44(a).

20  
21 Atkins, CAMFT: CAMFT does not have a strong position regarding the  
22 content here, but desires consistency.

23  
24 The Committee directed staff to make the changes suggested by Sovec.

25  
26 **3. Statute for Trainees/Interns**

27  
28 Discussion/Comment: None

29  
30 Atkins, CAMFT: CAMFT supports the changes.

31  
32 Staff will make the same change on §4996.15(b) as is 4999.46.1(c): use  
33 “prior to initiating” instead of “prior to performing.”

34  
35 **4. Amendment of Advertising Definition**

36  
37 Discussion/Comment: None

38  
39 Direction: Directed staff to draft language and make discussed changes  
40 suggested by Sovec.

1 **7. Discussion and Possible Recommendations to Initiate a Rulemaking to**  
2 **Amend the Board’s Standards of Practice for Telehealth Regulations (16**  
3 **CCR §1815.5)**  
4

5 The Telehealth Committee proposed amendments to the Board’s telehealth  
6 regulations, which were presented to the Policy and Advocacy Committee and  
7 provided in materials as Attachment A.  
8

9 **1. Subdivisions 1815.5(e) and (f)**  
10

11 Regulation §1815.5(e) states that a California licensee or registrant may  
12 only provide telehealth to a client in another jurisdiction if they meet the  
13 requirements to lawfully provide services in that jurisdiction, and if  
14 telehealth is allowed by that jurisdiction.  
15

16 Regulation §1815.5(f) states that failure to comply with any provisions of  
17 the Board’s telehealth regulations is unprofessional conduct.  
18

19 CAMFT had raised a concern that making it unprofessional conduct if a  
20 therapist fails to check to make sure he or she is following the laws of the  
21 jurisdiction where the client is located is too rigid and could lead to  
22 unintended consequences. CAMFT suggested that the location of  
23 1815.5(e) be moved to after 1815.5(f) so that it functions as guidance,  
24 rather than a requirement that one must follow to avoid discipline by this  
25 Board.  
26

27 However, the Board’s Regulations Counsel pointed out that any violation  
28 of the Board’s statutes and regulations is unprofessional conduct.  
29

30 Based on this, the Telehealth Committee believes that §1815.5(f) is  
31 unnecessary and should be struck.  
32

33 **2. Replace the Term “Valid and Current” License or Registration;**  
34 **Subdivision 1815.5(a)**  
35

36 The Telehealth Committee recommended replacing the requirement in  
37 §1815.5(a) that requires a license be “valid and current” to engage in  
38 telehealth, to instead require the license to be “current and active”.  
39

40 **3. Disclosure of License and Registration Number**  
41

42 The Board is currently pursuing a legislative proposal to make changes to  
43 how license information is shared with clients. Instead of continuing to  
44 require a licensee or registrant to display the license or registration in a  
45 conspicuous place in their primary place of practice, the Board’s proposed  
46 amendments will require this information instead be included in the notice



1 to clients that is required to be provided prior to initiating psychotherapy  
2 services.

3  
4 If the proposed amendment is successful, the Board may wish to review  
5 §1815.5(c)(3), which requires a client be provided with the therapist's  
6 license or registration number and type of license and registration upon  
7 initiation of telehealth services, as it may no longer be necessary.

8  
9 Staff recommends that if the telehealth regulations are approved by the  
10 Board, that this issue be revisited prior to the submission of the  
11 regulations to the Office of Administrative Law (OAL) for initial notice to  
12 the public.

13  
14 **4. Utilization of "Industry Best Practices"**

15  
16 The current telehealth regulations (§1815.5(d)(3)) require that each time a  
17 therapist provides services via telehealth, they must "utilize industry best  
18 practices for telehealth to ensure both client confidentiality and the  
19 security of the communication medium."

20  
21 The requirement to utilize "industry best practices" is a vague term that  
22 has led to confusion about how this requirement is fulfilled.

23  
24 The Telehealth Committee moved forward with replacing the requirement  
25 in 1815.5(d)(3) to utilize "industry best practices" with the requirement  
26 language used in statute by the Veterinary Medical Board. Staff worked  
27 with the Board's regulation counsel to expand on the statute to specifically  
28 cite the main state and federal laws and regulations that would be  
29 included in this requirement. The proposed text was provided as  
30 Attachment A.

31  
32 Discussion/Comments

33  
34 Caldwell: §1815.5(a) requires a California license or registration to practice  
35 within these scopes via telehealth. This may be inconsistent with statute  
36 because BPC §2290.5(a)(3) defines MFT and PCC trainees as telehealth  
37 providers; they could be working within those scopes via telehealth without a  
38 license or registration.

39  
40 Helms: Staff decided against bringing trainees into the telehealth regulations  
41 because the Board does not regulate them.

42  
43 Schieldge: Agreed that trainees cannot be included in the regulation because of  
44 the jurisdictional issue.

1 Atkins, CAMFT: Confused about when BBS has jurisdiction over trainees and  
2 when it does not have jurisdiction.  
3

4 Motion: Recommend approval of the proposed regulatory text in Attachment A  
5 with gender-neutral pronoun changes in §§1815.5(c)(3) and 1815.5(d) and  
6 recommend the Board consider all of the following actions:  
7

- 8 (1) Direct staff to submit the text in Attachment A as revised to the Director of  
9 the Department of Consumer Affairs and the Business, Consumer Services,  
10 and Housing Agency for review; and if no adverse comments are received,  
11 authorize the Executive Officer to take all steps necessary to initiate the  
12 rulemaking process, make any non-substantive changes to the package,  
13 and set the matter for a hearing if requested.  
14
- 15 (2) If no adverse comments are received during the 45-day comment period  
16 and no hearing is requested, authorize the Executive Officer to take all  
17 steps necessary to complete the rulemaking and adopt the proposed  
18 regulations as noticed for Title 16, California Code of Regulations section  
19 1815.5.  
20

21 M/S: Jones/Sovec  
22

23 Public Comment: None  
24

25 Motion carried: 4 yea, 0 nay.  
26

Member	Vote
Christopher Jones	Yes
Abigail Ortega	Yes
John Sovec	Yes
Wendy Strack	Yes

27  
28 **8. Update on Board-Sponsored Legislation**  
29

30 Licensing Requirements Bill Proposal

31 This bill proposes clarifying two of the Board’s statutory requirements:

- 32
- 33 • The requirement to physically display a license or registration; and
  - 34 • The allowable number of “supervisees” that a supervisor is permitted to  
35 oversee.

36 Omnibus Bill Proposal

37 This bill proposal, approved by the Board at its November 2023 meeting, makes  
38 minor, technical, or non-substantive amendments to add clarity to current law.  
39

- 1 **9. Update on Board Rulemaking Proposals**  
2  
3 Disciplinary Guidelines  
4 Status: Preparation for DCA Initial Review Process  
5  
6 Unprofessional Conduct  
7 Status: Preparation for Submittal to the Office of Administrative Law for Public  
8 Notice of Proposed Regulatory Action  
9
- 10 **10. Suggestions for Future Agenda items**  
11  
12 None  
13
- 14 **11. Public Comment for Items not on the Agenda**  
15  
16 None  
17
- 18 **12. Adjournment**  
19  
20 The Committee adjourned at 4:06 p.m.