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**cTo:** Board Members

**Date:** September 3, 2024

**From:** Christy Berger, Regulatory Manager

**Subject: Discussion and Possible Recommendation Regarding Continuing Education Regulations**

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The purpose of this item is to discuss proposed regulatory changes to continuing education (CE) requirements for licensees and registrants.

### **Current CE Requirements**

During each two-year renewal cycle, licensees are currently required to take 36 hours of CE including a 6-hour Law and Ethics course. New licensees may also have specific courses to take prior to their first renewal if they were not completed previously. Registrants are currently required to take three hours of CE in law and ethics during each one-year renewal cycle per Assembly Bill (AB) 1759 (Chapter 520, Statutes of 2022).

### **Summary of Proposed Changes**

The proposal, as provided in Attachments A, B, and C (shown in underline for additions and strikethrough for deletions), would make the following major changes to the Board's CE regulations:

- Credit up to 6 hours of CE per renewal cycle for licensees attending California Board of Behavioral Sciences meetings.
- Credit up to 18 hours of CE per renewal cycle for licensees providing direct supervision to an associate, or marriage and family therapist trainee.
- Allow other types of healthcare providers to verify a disability or medical condition for purposes of a temporary waiver of CE, and update the waiver request forms.
- Specify that the 6-hour law and ethics course required of licensees must be based on California law and ethics.

## **Details of Proposed Changes**

### **CE Credit for Specified Activities (Section 1887.3)**

Licensees who participate in certain types of Board activities are awarded with CE credit for their participation. The proposal would clarify that only California Board of Behavioral Sciences activities will be credited (§1887.3(h-k)).

The Board's Strategic Plan Goal 6.4 states, "Identify and implement strategies to gain increased participation in Board meetings from a wider group of stakeholders." One way to gain increased participation is to offer CE credit to licensees for attending a Board or Committee meeting. The Board of Psychology (BOP) and Respiratory Care Board (RCB) now offers this, and their regulations took effect in 2022 and 2023, respectively. Staff reviewed BOP's and RCB's regulations and has drafted language for the Board to consider, which would do the following:

- Allow a licensee who attends a BBS meeting virtually or in person to claim up to 6 hours of CE per two-year renewal cycle.
- Credit one hour of CE for every full hour of meeting attendance.
- Require the licensee to maintain a record of attendance including meeting date, name and number of hours attended.
- Require the licensee to sign in and out on an attendance sheet if attending in person, and to sign into virtual meetings with their full name and email address as on record with the Board to provide a record of their virtual attendance.
- Prohibit a petitioner seeking the reinstatement of a revoked license or early termination of probation from earning CE credit for attending a board meeting on the same day in which said petitioner's hearing is conducted.

The BOP also recently updated their regulations to offer licensees who provide direct supervision with CE credit. Staff reviewed BOP's regulations and has drafted language for the Board to consider, which would do the following:

- Allow a licensee who provides direct supervision of an associate, or marriage and family therapist trainee, to claim up to 18 hours of CE per two-year renewal cycle.
- Credit one hour of CE for every full hour of supervision provided.
- Require the licensee to maintain a record of supervision, including dates of supervision, number of hours, and a copy of the supervisee's signed supervision agreement.

### Request for Temporary Waiver of CE (Section 1887.2)

Licensees are currently able to request a temporary waiver of their continuing education requirement (with the exception of the 6-hour law and ethics course) when one of the following occurs:

- For at least one year during the licensee's current renewal period the licensee had a physical or mental disability or medical condition that substantially limited one or more life activities and caused the licensee's earned income to drop below the substantial gainful activity amount as set forth by the Social Security Administration; or
- For at least one year during the licensee's current renewal period, the licensee was a primary caregiver for an immediate family member who had a total physical or mental disability.

The proposal would do the following:

- Specify that registrants are not eligible for a CE waiver. Staff recommend this approach since registrants only have to complete 3 hours of CE per year and the topic is law and ethics. Waivers are offered for licensees since they are required to complete 36 hours every 2 years, which is a greater burden. When a CE waiver is granted to a licensee, then per section 1887.2(g), the waiver does not apply to the 6 hours in law and ethics due to the importance of maintaining competency in this area where there is increased risk of harm to the public.
- Strike references to "Address of Record" reporting requirements on both the Temporary Waiver of CE form and Verification of Disability forms as unnecessary but add "Date of Birth" as an additional method of verifying identity.
- Allow other types of licensed healthcare providers (physician, physician assistant, nurse practitioner<sup>1</sup>, psychologist, marriage and family therapist, clinical social worker or professional clinical counselor) to provide verification of the disability or medical condition (currently only a licensed physician or psychologist is allowed) for greater flexibility in accommodating a licensee's personal or family medical issues.
- Modify the Temporary Waiver of CE form and Verification of Disability forms, which are incorporated by reference into the regulation, to reflect the above changes and to make several technical and nonsubstantive changes.

### Minor and Technical Regulation Cleanup and Clarification

A variety of minor and technical regulation cleanup and clarification is proposed, including adding registrants to pertinent sections per AB 1759, as well as the following:

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<sup>1</sup> *Physician assistants are authorized to perform disability certifications per Business and Professions Code (BPC) section 3502.3; nurse practitioners are authorized per BPC section 2835.7.*

- Sections 1822.51, 1829.2 and 1877.2: Strike outdated language pertaining to the 12-hour course on law and ethics that was removed from statute via AB 1759.
- Section 1887: Update the definition of “renewal period” to include registrants.
- Section 1887.1(b), 1887.3, 1887.4.2, 1887.4.3 and 1887.12: Update these sections to include registrants per AB 1759.

### **Recommendation**

Staff recommends that the Board review the proposed regulatory text shown in **Attachments A, B and C**, and consider whether to approve it as written, or to suggest changes to the proposed text. After review and discussion, consider one of the following motions:

**Motion A:** (To be used if the Board has NO changes to the proposed regulatory text):

Approve the proposed regulatory text as presented in **Attachments A, B and C**, and submit the approved 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 are received, authorize the Executive Officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the text and the package, and set the matter for a hearing if requested. If after the 45-day public comment period, no adverse comments are received and no public hearing is requested, authorize the Executive Officer to take all steps necessary to complete the rulemaking, and adopt the proposed regulations as noticed for Title 16, California Code of Regulations sections 1822.51, 1829.2, 1877.2, 1887, 1887.1, 1887.2, 1887.3, 1887.4.2, 1887.4.3 and 1887.12.

**Motion B:** (To be used if the Board DOES have suggested changes for the proposed regulatory text)

Approve the proposed regulatory text as presented in **Attachments A, B and C** with the following changes: (*specify the proposed changes to the proposed text*). In addition, submit the approved 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 are received, authorize the Executive Officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the text and the package, and set the matter for a hearing if requested. If after the 45-day public comment period, no adverse comments are received and no public hearing is requested, authorize the Executive Officer to take all steps necessary to complete the rulemaking, and adopt the proposed regulations as noticed for Title 16, California Code of Regulations sections 1822.51, 1829.2, 1877.2, 1887, 1887.1, 1887.2, 1887.3, 1887.4.2, 1887.4.3 and 1887.12.

### **Attachments**

Attachment A: Proposed Language

Attachment B: Proposed Amendments to Form No. 37A-635

Attachment C: Proposed Amendments to Form No. 37A-636

## ATTACHMENT A

### **Amend § 1822.51. Eligibility for Law and Ethics Examination.**

Notwithstanding any other provision of law, eligibility to take the California law and ethics examination requires an applicant to, at minimum, meet one of the following:

(a) The applicant holds a current, delinquent or cancelled associate registration, submits a request and pays the fee to take the examination.

~~(1) When a registrant who holds a current or delinquent registration takes the examination and does not pass during his or her one-year renewal cycle, the registrant shall complete a 12-hour course on California law and ethics as specified in section 4999.55(e) of the Code, in order to be eligible to take the examination during the next renewal cycle.~~

(b) The applicant currently has an approved application for licensure.

NOTE: Authority cited: Section 4990.20(a), Business and Professions Code. Reference: Sections 4999.52, ~~4999.53, 4999.53 and~~ 4999.55 ~~and 4999.100~~, Business and Professions Code.

### **Amend § 1829.2. Eligibility for Law and Ethics Examination.**

Notwithstanding any other provision of law, eligibility to take the California law and ethics examination requires an applicant to, at minimum, meet one of the following:

(a) The applicant holds a current, delinquent or cancelled associate registration, submits a request and pays the fee to take the examination.

~~(1) When a registrant who holds a current or delinquent registration takes the examination and does not pass during his or her one-year renewal cycle, the registrant shall complete a 12-hour course on California law and ethics as specified in section 4980.399(e) of the Code, in order to be eligible to take the examination during the next renewal cycle.~~

(b) The applicant currently has an approved application for licensure.

NOTE: Authority cited: Sections 4980.60 and 4990.20(a), Business and Professions Code. Reference: Sections 4980.397, ~~4980.398, 4980.399, 4980.399 and~~ 4980.50 ~~and 4984.01~~, Business and Professions Code.

### **Amend § 1877.2. Eligibility for Law and Ethics Examination.**

Notwithstanding any other provision of law, eligibility to take the California law and ethics examination requires an applicant to, at minimum, meet one of the following:

(a) The applicant holds a current, delinquent or cancelled associate registration, submits a request and pays the fee to take the examination.

~~(1) When a registrant who holds a current or delinquent registration takes the examination and does not pass during his or her one-year renewal cycle, the registrant shall complete a 12-hour course on California law and ethics as specified in section 4992.09(e) of the Code, in order to be eligible to take the examination during the next renewal cycle.~~

NOTE: Authority cited: Section 4990.20(a), Business and Professions Code. Reference: Sections 4992.05, ~~4992.07, 4992.09, 4992.09 and~~ 4992.1 ~~and 4996.28~~, Business and Professions Code.

### **Amend § 1887. Definitions.**

As used in this article:

(a) A continuing education “course” means a form of systematic learning at least one hour in length. This may include, but is not limited to, academic studies, extension studies, lectures, conferences, seminars, workshops, written, audio, or visual instruction or activities, including interactive video instruction and activities electronically transmitted from another location, that have been verified and approved by the continuing education provider.

(b) A “provider” means an organization, institution, association, university, or other person or entity assuming full responsibility for the course offered.

(c) A “renewal period” means one of the following, as applicable:

(1) Licensees: The two-year period that spans from the first day after the license's issue date or prior expiration date to the current license expiration date.

(2) Registrants: The one-year period that spans from the first day after the registration's issue date or prior expiration date to the current registration expiration date.

(d) An “approval agency” means an organization recognized by the board that evaluates and approves providers of continuing education, ensures courses offered by its providers meet the board's continuing education requirements, and monitors the quality of each approved continuing education course.

NOTE: Authority cited: Sections 4980.60 and 4990.20, Business and Professions Code. Reference: Sections 4980.54, ~~4980.399~~, 4989.34, ~~4992.09~~, 4996.22, ~~4999.55~~ and 4999.76, Business and Professions Code.

**Amend § 1887.1. Continuing Education Requirements and License or Registration Renewal.**

- (a) Except as provided in section 1887.2, a licensee shall certify in writing, when applying for license renewal, by signing a statement under penalty of perjury that during the preceding renewal period the licensee has completed thirty-six (36) hours of continuing education credit as set forth in sections 4980.54, 4989.34, 4996.22, and 4999.76 of the Code.
- (b) When applying for registration renewal, a registrant shall certify in writing by signing a statement under penalty of perjury that during the preceding renewal period the registrant has completed three (3) hours of continuing education in the subject of California law and ethics as set forth in section 4980.399(e) of the Code.
- ~~(bc)~~ A licensee or registrant who falsifies or makes a material misrepresentation of fact when applying for license or registration renewal or who cannot verify completion of continuing education by producing a record of course completion, upon request by the board, is subject to disciplinary action under sections 4982(b), 4989.54 (b), 4992.3(b), and 4999.90(b) of the Code.
- ~~(ed)~~ Individuals who hold dual licensure or registration with the board may apply the same continuing education course to both licenses or registrations if the subject matter of the course relates to each license's license or registration type's scope of practice.

NOTE: Authority cited: Sections 4980.60 and 4990.20, Business and Professions Code.  
Reference: Sections 4980.54, 4980.399, 4982, 4989.34, 4989.54, 4992.09, 4992.3, 4996.22, 4999.55, 4999.76 and 4999.90, Business and Professions Code.

**Amend § 1887.2. Temporary Waivers of and Exemptions from Continuing Education Requirements.**

- (a) A licensee is exempt from the continuing education requirement if their license is inactive pursuant to sections 4984.8, 4989.44, 4997, or 4999.112 of the Code, or retired pursuant to section 4984.41, 4989.45, 4997.1, or 4999.113 of the Code.
- (b) A licensee may submit a written request for a temporary waiver from the continuing education requirement for the licensee's current renewal period, for any of the reasons listed in subsection (c) below. The request shall be on a form entitled "Request for Temporary Continuing Education (CE) Waiver -- Licensee Application," Form No. DCA BBS 37A-635 (Revised 08/22[OAL to insert new revision date]), hereby incorporated by reference. The request must be submitted to the board in writing at least sixty (60) days prior to the license expiration date.
- (c) The board shall grant a temporary waiver of continuing education if the licensee can provide evidence, as specified in subsections (d) and (e) below, that one of the following occurred:

- (1) For at least one year during the licensee's current license renewal period, the licensee had a physical or mental disability or medical condition that did both of the following:
  - (A) Substantially limited one or more life activities as verified by the documentation required in subsection (d), and
  - (B) Caused the licensee's earned income, whether earned as an employee, independent contractor, or while self-employed, to drop below the substantial gainful activity amount for non-blind individuals during that year, as set forth by the Social Security Administration per section 404.1574(b)(2) of the Social Security Act.
- (2) For at least one year during the licensee's current license renewal period, the licensee was the primary caregiver for an immediate family member, including a domestic partner, who had a total physical or mental disability. A "total physical or mental disability" means that the family member is both unable to work and unable to perform activities of daily living without substantial assistance, such as eating, bathing, dressing, housework, shopping, or meal preparation.
- (d) The licensee's or immediate family member's physical or mental disability or medical condition must be verified by a ~~licensed physician or psychologist with expertise in the area of the physical or mental disability or medical condition~~healthcare provider who holds a current and active license as a physician, physician assistant, nurse practitioner, psychologist, marriage and family therapist, clinical social worker or professional clinical counselor. Verification of the physical or mental disability or medical condition must be submitted by the licensee on a form entitled "Request for Temporary Continuing Education (CE) Waiver -- Verification of Disability or Medical Condition," Form No. DCA BBS 37A-636 (Revised ~~08/22~~[OAL to insert new revision date]), hereby incorporated by reference. Form No. DCA BBS 37A-636 must include an attached copy of the family member's written authorization for release of their protected health information for the limited purpose of the licensee's request for a temporary waiver of continuing education when the licensee is the family member's primary caregiver.
- (e) A licensee shall provide proof of all income earned from work activity during the one-year period of the licensee's disability. If the licensee did not earn any work income, the licensee shall provide proof of receiving disability payments, or provide other evidence demonstrating that the licensee did not earn any income from work activity.
- (f) The board will notify the licensee whether or not the waiver is granted within thirty (30) days after the request is received. If the request for waiver is denied, the licensee is responsible for completing the full amount of continuing education required for license renewal, if renewing in an active status. If the request for waiver is approved, it shall be valid for the current renewal period only.



- (g) Licensees granted a temporary waiver shall not be exempt from completing the six (6) hours of continuing education in California law and ethics required by section 1887.3.

NOTE: Authority cited: Sections 4980.60 and 4990.20, Business and Professions Code. Reference: Sections 4980.54, 4984.8, 4984.41, 4989.34, 4989.44, 4989.45, 4996.22, 4997, 4997.1, 4999.76, 4999.112 and 4999.113, Business and Professions Code; and Sections 12926 and 12944, Government Code.

### **Amend § 1887.3. Continuing Education Course Requirements and Credit for Specified Activities.**

- (a) During each two-year license renewal period, a licensee shall accrue at least thirty-six (36) hours of continuing education coursework as defined in section 1887.4.0.

(b) During each one-year registration renewal period, a registrant shall accrue at least three (3) hours of continuing education coursework in the subject of California law and ethics as specified in sections 4980.399, 4992.09, or 4999.55 of the Code, as applicable.

- (bc) A marriage and family therapist, clinical social worker, and professional clinical counselor licensee shall take a continuing education course in the characteristics and methods of assessment and treatment of people living with human immunodeficiency virus (HIV) and acquired immune deficiency syndrome (AIDS) during their first renewal period after the effective date of these regulations. The course shall be at least seven (7) hours in length and its content shall comply with the requirements of section 32 of the Code. This is a one-time requirement for all licensees. Equivalent HIV and AIDS courses taken prior to the effective date of these regulations, or proof of equivalent teaching or practice experience, may be submitted to the board for approval in lieu of this requirement; however, this coursework or experience shall not be credited as hours towards the continuing education requirements.

- (ed) Any person renewing a license shall complete a minimum of six (6) hours of continuing education in the subject of California law and ethics for each renewal period. The six (6) hours shall be considered part of the thirty-six (36) hour continuing education requirement. A course on law and ethics completed by a supervisor in order to fulfill the supervisor training requirement pursuant to Article 3, 4 or 6 shall not be accepted toward meeting the minimum six (6) hours of law and ethics training but shall count toward the 36-hour continuing education requirement.

- (de) A licensee may not claim the same course more than once per license type during a single renewal period for hours of continuing education credit.

- (ef) If a licensee teaches a course provided by a board-accepted provider, the licensee may claim credit for the course, receiving the same amount of hours of continuing

education credit as a licensee who attended the course. The licensee may only claim the course one time during a single renewal period. A maximum of 18 hours of continuing education may be met by teaching courses during a single renewal period.

- (fg) A licensee or registrant who takes a course as a condition of probation resulting from disciplinary action by the board may not apply the course as credit towards the continuing education requirement.
- (gh) A licensee who attends a California Board of Behavioral Sciences enforcement case review training shall be credited with up to six (6) hours of continuing education in the renewal cycle during which the case review training was attended. The continuing education hours earned by attending a board enforcement case review training may only be used to satisfy the law and ethics portion of the continuing education requirement.
- (hi) A licensee who acts as a California Board of Behavioral Sciences subject matter expert (SME) for an enforcement case review shall be credited with six (6) hours of continuing education in the renewal cycle during which the enforcement case review was performed. The continuing education hours earned by acting as a board enforcement case SME may only be used to satisfy the law and ethics portion of the continuing education requirement.
- (ij) A licensee who participates in a California Board of Behavioral Sciences examination development workshop shall be credited with six (6) hours of continuing education in the renewal cycle during which the examination development workshop was attended. The continuing education hours earned by participating in a board examination development workshop may only be used to satisfy the law and ethics portion of the continuing education requirement.
- (jk) A licensee who completes a California Board of Behavioral Sciences occupational analysis survey in full shall be credited with six (6) hours of continuing education for the renewal cycle during which the survey was completed.
- (l) Documentation of completion for the activities specified in subsections (h) through (k) ("qualifying activity") shall consist of a letter or certificate issued by the board or its designee upon completion of the qualifying activity to the licensee indicating the name of the licensee, the type of qualifying activity, the hours of qualifying credit earned, and the date(s) of completion.
- (m) A licensee may earn up to six (6) hours of continuing education credit through attendance at open sessions of California Board of Behavioral Sciences Board or Committee meetings, virtually or in person, for the renewal cycle during which the meeting(s) occurred.
- (1) Continuing education credit shall be credited on an hour-for-hour basis with one hour credited for each full hour spent in attendance at a meeting.

- (2) To receive credit, the licensee shall maintain a record of attendance including date of meeting, name of meeting, and number of full hours attended. In addition, the licensee shall do the following:
- (A) For a meeting attended in person, the licensee shall sign in and out on the provided attendance sheet, providing their full name and license number as on record with the Board, and indicating the time of arrival and time of departure.
- (B) For a meeting held through a virtual, internet-based application (Webex or similar online meeting or videoconferencing platform), the licensee shall sign into the meeting using their full name and email address as on record with the Board.
- (3) Watching a recording of a past Board or Committee meeting shall not count toward continuing education.
- (4) A petitioner seeking the reinstatement of a revoked license or early termination of probation may not earn any continuing education credit for attending a board meeting on the same day in which said petitioner's hearing is conducted.
- (n) A licensee who provides direct supervision of a marriage and family therapist trainee or associate marriage and family therapist who is gaining experience under section 4980.43 of the Code, an associate clinical social worker who is gaining experience under section 4996.2 of the Code, or an associate professional clinical counselor who is gaining experience under section 4999.46 of the Code, shall be credited with up to 18 hours of continuing education for the renewal cycle during which the supervision was provided in accordance with this subsection.
- (1) For the purposes of calculating hours earned, one hour of continuing education will be credited for each full hour of supervision, up to a maximum of 18 hours credited per renewal cycle.
- (2) Licensees shall maintain a written record of this activity that includes all of the following: the dates of supervision, number of hours of supervision provided, and a copy of the supervisee's signed supervision agreement with the licensee pursuant to section 1820(c), 1833(c) or 1869(c), as applicable.
- (ko) A licensee who participates in a mental health professional organization's law and ethics review committee shall be credited with up to six (6) hours of continuing education in the renewal cycle during which the participation occurred. The continuing education earned by participating in a professional organization's law and ethics review committee may only be used to satisfy the law and ethics portion of the continuing education requirement. Documentation of completion shall consist of a letter or certificate from the professional organization that lists the name of the licensee, the date(s) and number of hours attended, and the name of the mental health professional organization's law and ethics review committee.

~~(p) Documentation of completion for the activities specified in subsections (g) through (j) shall consist of a letter or certificate issued by the board. For subsection (k), documentation of completion shall consist of a letter or certificate from the professional organization.~~ Licensees and registrants shall maintain records of completed activities for a minimum of two years from the date of license or registration renewal for which the activity was completed and shall make these records available to the board for auditing purposes upon request.

NOTE: Authority cited: Sections 4980.60 and 4990.20, Business and Professions Code. Reference: Sections 29, 32, 4980.54, 4980.399, 4989.34, 4992.09, 4996.22, 4999.55 and 4999.76, Business and Professions Code.

### **Amend § 1887.4.2. Approval Agency Responsibilities.**

Each board-recognized approval agency shall:

- (a) Evaluate each continuing education provider seeking approval in accordance with the requirements of section 1887.4.3.
- (b) Maintain a list of the names and addresses of persons responsible for the provider's continuing education program. The approval agency shall require that any change in the responsible person shall be reported to the approval agency within 15 days of the effective date of the change.
- (c) Provide the board with the name, address and responsible party of each provider upon request.
- (d) Respond to complaints from the board, providers, ~~or~~ licensees, or registrants concerning activities of any of its approved providers or their courses.
- (e) Conduct periodic reviews of courses offered by providers approved by the agency to determine compliance with the agency's requirements and requirements of the board and, upon request, report the findings of such reviews to the board.
- (f) Ensure that the continuing education coursework offered by its providers meets the continuing education requirements of the board.
- (g) Establish a procedure for reconsideration of its decision that a provider or a provider's course does not meet statutory or regulatory criteria.

NOTE: Authority cited: Sections 4980.60 and 4990.20, Business and Professions Code. Reference: Sections 4980.54, 4980.399, 4989.34, 4992.09, 4996.22, 4999.55 and 4999.76, Business and Professions Code.

**Amend § 1887.4.3. Acceptable Continuing Education Providers and Responsibilities.**

- (a) A continuing education provider shall be one of the following:
- (1) An accredited or approved postsecondary institution that meets the requirements set forth in sections 4980.54(f)(1), 4989.34, 4996.22(d)(1), or 4999.76(d) of the Code;
  - (2) A board-recognized approval agency or a continuing education provider that has been approved or registered by a board-recognized approval agency for continuing education; or
  - (3) A professional association that is recognized by the board as a continuing education provider. The following professional associations are recognized by the board as continuing education providers:
    - (A) American Association for Marriage and Family Therapy (AAMFT)
    - (B) American Counseling Association (ACA)
    - (C) California Association for Licensed Professional Clinical Counselors (CALPCC)
    - (D) California Association of Marriage and Family Therapists (CAMFT)
    - (E) California Association of School Psychologists (CASP)
    - (F) California Counseling Association (CCA)
    - (G) California Psychological Association (CPA)
    - (H) California Society for Clinical Social Work (CSCSW)
    - (I) National Association of Social Workers-California Chapter (NASW-CA)
- (b) Each provider shall ensure that each continuing education course complies with the requirements of section 1887.4.0.
- (c) Each provider shall furnish each licensee and registrant a record of course completion as defined in section 1887.11.0.
- (d) Each provider shall maintain records of completion of their continuing education courses for four (4) years as defined in section 1887.12(b). Credit hours awarded shall be in compliance with section 1887.5.
- (e) Each provider shall have a methodology for determining the credit hours awarded for the completion of continuing education courses.

- (f) No provider shall discriminate against any individual or group with respect to any service, program or activity on the basis of gender, race, creed, national origin, sexual orientation, religion, or age, or other prohibited basis.
- (g) No provider shall promote or advocate for a single modality of treatment that is discriminatory or likely to harm clients based upon current accepted standards of practice.
- (h) Each provider must be able to demonstrate that their programs train licensees or registrants to treat any client in an ethical and clinically sound manner consistent with the code of ethics of their accrediting agency, approval agency, or professional association.
- (i) Each provider must have written policies and procedures for grievance resolution and must respond to grievances from course attendees, regulatory boards, or their governing accreditation agency in a timely manner.
- (j) When a provider works with another party on the development, distribution, and/or presentation of a continuing education course (joint sponsorship), there shall be procedures to identify and document the functions of each participating party.
- (k) Each provider is responsible for meeting all applicable local, state and federal standards, including the Americans with Disabilities Act of 1990 (ADA), 42 U.S.C. §§ 12101-12213 (2008).
- (l) Each provider shall submit all documents related to an audit of course material to the approval agency or the board upon written request.

NOTE: Authority cited: Sections 4980.60 and 4990.20, Business and Professions Code. Reference: Sections 4980.54, 4980.399, 4989.34, 4992.09, 4996.22, 4999.55 and 4999.76, Business and Professions Code.

**Amend § 1887.12. Licensee and Provider Course Records Record Requirements for Providers, Licensees and Registrants.**

- (a) A licensee or registrant shall maintain records of course completion for a period of at least two (2) years from the date of license or registration renewal for which the course was completed.
- (b) A provider shall maintain records related to continuing education courses for a period of at least four (4) years. Records shall include:
  - (1) sSyllabi for all courses;
  - (2) tThe time and location of all courses;
  - (3) eCourse advertisements;
  - (4) eCourse instructors' vitae or resumes;

- (5) aAttendance rosters with the names and license or registration numbers of licensees who attended the courses;
  - (6) sSign-in sheets; and
  - (7) rRecords of course completion issued to licensees and registrants who attended the courses.
- (c) The board may audit the course records of a provider to ensure compliance with the board's continuing education requirements.

NOTE: Authority cited: Sections 4980.60, 4989.34, 4990.20 and 4999.76, Business and Professions Code. Reference: Sections 4980.54, 4980.399, 4989.34, 4992.09, 4996.22, 4999.55 and 4999.76, Business and Professions Code.

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## Board of Behavioral Sciences

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# REQUEST FOR TEMPORARY CONTINUING EDUCATION (CE) WAIVER: INSTRUCTIONS AND INFORMATION

### **IMPORTANT:**

- **Registrants are ineligible to apply for a good cause waiver. This form should be used only for licensees seeking a temporary waiver of their CE requirements in accordance with Title 16, California Code of Regulations section 1887.2.**
- **The board must receive your request for CE waiver and verification of disability at least sixty (60) days PRIOR to the expiration date of your license in order for the waiver to be considered. Otherwise, your request will be denied. Allow 30 days for processing.**
- **The 6-hour Law and Ethics CE course required for each renewal CANNOT BE WAIVED. You must complete this course before renewing.**

### **Who Qualifies for a Temporary CE Waiver?**

You may qualify for a temporary CE waiver if, for at least one year during your current license renewal period, you had one of the following:

- A physical or mental disability or medical condition that substantially limited one or more life activities and caused your earned income to drop below the substantial gainful activity amount for non-blind individuals during that year, as defined by the Social Security Administration (see <https://www.ssa.gov/oact/cola/sga.html>); OR
- You were the primary caregiver for an immediate family member, including a domestic partner, who had a total physical or mental disability. A “total physical or mental disability” means that the family member is both unable to work and unable to perform activities of daily living without substantial assistance, such as eating, bathing, dressing, housework, shopping, or meal preparation.

### **How to Request a Temporary Waiver of CE**

To request a temporary waiver, submit the following:

- **Waiver Request form.** Complete the form titled, “Request for Temporary Continuing Education Waiver – Licensee Application” Form No. [DCA BBS 37A-635](#) (Revised [08/22](#)[\[OAL to insert new revision date\]](#)).

- **Verification of Disability.** If your waiver request is based on your own disability or medical condition, complete Part 2 of Form No. [DCA BBS 37A-635](#), [sign and date the declaration at the end of this form](#), and submit a completed “Request for Temporary Continuing Education Waiver – Verification of Disability or Medical Condition” Form No. [DCA BBS 37A-636](#) (Revised [08/22\[OAL to insert new revision date\]](#)) and proof of income during the period of disability.

Form No. [DCA BBS 37A-636](#) must be completed by the attending [physician or psychologist healthcare provider who holds a current and active license as a physician, physician assistant, nurse practitioner, psychologist, marriage and family therapist, clinical social worker or professional clinical counselor](#). The Board will accept a written statement from the [physician or psychologist healthcare provider](#) in lieu of completing the form, provided that the statement provides all of the information requested on the form, and includes all of the following: the name, title, address, telephone number, professional license number, and original signature of the [physician or psychologist healthcare provider](#) providing the verification.

- **Verification of Disability of Immediate Family Member for Whom You were the Primary Caregiver.** If your waiver request is based on you being the primary caregiver of an immediate family member with a disability or medical condition, complete Part 3 of Form No. [DCA BBS 37A-635](#), [sign and date the declaration at the end of this form](#), and submit a completed “Request for Temporary Continuing Education Waiver – Verification of Disability or Medical Condition” Form No. [DCA BBS 37A-636](#) (Revised [08/22\[OAL to insert new revision date\]](#)). This form must be completed by the attending [physician or psychologist healthcare provider](#).

The Board will accept a written statement from the [physician or psychologist healthcare provider](#) in lieu of completing the form, provided that the statement provides all of the information requested on the form, and includes all of the following: the name, title, address, telephone number, professional license number, and original signature of the [physician or psychologist healthcare provider](#) providing the verification.

Any [physician or psychologist healthcare provider](#) verification of a Family Member’s disability or medical condition must include a copy of the Family Member’s written authorization to release protected health information (PHI) to the board for the limited purpose of verification for the licensee’s CE waiver request.

- **Proof of Income.** If your request is due to your own disability or medical condition, you must submit proof of all income earned from work activity during the (minimum) one-year period of disability. If you did not earn any income, provide proof of receiving disability payments, or provide other evidence demonstrating that you did not earn any income from work activity.

You will be notified whether or not your request was granted within thirty (30) days from the date the board receives your request and all supporting documentation.

### **Waivers Cannot be Granted Before the Fact**

The board can only grant a waiver for your current renewal period. The board cannot grant a waiver for a future renewal period, nor can it grant a waiver for a situation that you anticipate. You may request a waiver after the qualifying situation has occurred, or during the qualifying situation, as long as you meet the minimum criteria.

### **Send Your Waiver Request BEFORE Submitting Your Renewal Application**

Do not submit your renewal application until after the board has responded to your waiver request. Courtesy renewal applications are mailed out 90 days prior to your license expiration date. It takes 30 days to process an application for waiver.

### **If Your Waiver Request is Denied**

If your request for waiver is denied, you will be required to complete all CE hours, including any mandatory coursework, prior to renewing your license in an active status. If you are unable to complete your CE hours prior to your expiration date, consider renewing your license as inactive. This will help you avoid a delinquency fee. You may reactivate your license once you have completed the required CE. It is against the law to practice with an inactive or delinquent license.

### **If Your Waiver Request is Approved**

You must complete the 6-hour course in Law and Ethics prior to renewing your license with an active status.

### **For More Information**

See Title 16, California Code of Regulations section 1887.2.

### **Notice of Collection of Personal Information:**

The Board of Behavioral Sciences (board) of the Department of Consumer Affairs collects the personal information requested on this form as authorized by Business and Professions Code sections 4980.54, 4989.34, 4996.22 and 4999.76, and Title 16 California Code of Regulations (CCR) section 1887.2 for the purpose of determining eligibility for a “good cause” waiver of the board’s continuing education requirements for the specified renewal period.

Submission of the licensee’s personal information such as name, license number, medical history, and income is mandatory because the board cannot process the request for the CE waiver without this information. If the licensee requests a CE waiver because they were the primary caregiver for their immediate family member, submission of the family member’s personal information, such as name, medical history, name of health care provider, and family member’s authorization to release medical information is mandatory because the board cannot process the request for the CE waiver without this information. The personal information provided is for the limited purpose of evaluating and processing the licensee’s request for the CE waiver.

The board makes every effort to protect the personal information provided in this form. However, the information may be disclosed in the following circumstances:

- In response to a Public Records Act request (Government Code Section [62507920.000](#) and following), as allowed by the Information Practices Act (Civil Code Section 1798 and following);
- To another government agency as required by state or federal law; or
- In response to a court or administrative order, a subpoena, or a search warrant.

You, and any family member who have provided information on this form, have a right of access to records containing personal information about you maintained by the board, as permitted by the Information Practices Act. For questions about this notice or access to your records, contact the board at (916) 574-7830 or by email at [BBS.info@dca.ca.gov](mailto:BBS.info@dca.ca.gov). For questions about the Department of Consumer Affairs' privacy policy or the Information Practices Act, contact the Department of Consumer Affairs, 1625 North Market Blvd., Sacramento, CA 95834 or (800) 952-5210 or email [dca@dca.ca.gov](mailto:dca@dca.ca.gov).


**Board of Behavioral Sciences**

1625 North Market Blvd., Suite S200, Sacramento, CA 95834  
 Telephone: (916) 574-7830  
[www.bbs.ca.gov](http://www.bbs.ca.gov)



## REQUEST FOR TEMPORARY CONTINUING EDUCATION (CE) WAIVER LICENSEE APPLICATION

### Reason for Request – Health

*(Self or Primary Caregiver for Immediate Family Member)*

The board must receive this form with the “Verification of Disability or Medical Condition” at least SIXTY (60) DAYS PRIOR TO your license expiration date. Allow 30 days for processing.

#### READ INSTRUCTIONS BEFORE COMPLETING THIS FORM.

Any unanswered item will cause this request to be incomplete. Incomplete requests will not be processed.

**NOTE: The 6-hour Law and Ethics course CANNOT be waived**

*(Please type or print clearly in ink)*

Part 1 - To be <u>C</u> ompleted by <u>L</u> icensee				
NAME:	Last	First	Middle	
TELEPHONE:		EMAIL ADDRESS <del>(OPTIONAL)</del> :		
ADDRESS OF RECORD: <u>Number and Street</u>		<u>DATE OF BIRTH</u>	<u>City</u>	<u>State</u> <u>Zip</u>
LICENSE NUMBER:		CURRENT LICENSE EXPIRATION DATE: _____ / _____ / _____		
<b>REASON FOR WAIVER REQUEST:</b> (Mark one box only)  <input type="checkbox"/> <b>Health – Self</b> <i>(Complete Part 2)</i>  <input type="checkbox"/> <b>Health - Primary Caregiver of Immediate Family Member</b> <i>(Complete Part 3)</i>				

APPLICANT NAME:	Last	First	Middle
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**Part 2 - To be Completed by Licensee Regarding Own Medical Condition or Disability**

1. What is your diagnosed physical or mental disability or medical condition(s)?

\_\_\_\_\_

\_\_\_\_\_

2. Did your condition(s) substantially limit your ability to perform one or more life activities for at least one year during your current renewal cycle?    Yes    No

3. Did your condition(s) cause your earned income to drop below the “substantial gainful activity” amount for the non-blind during that year, as set by the Social Security Administration?  
 Yes    No

4. Attach both of the following:

- Completed (by physician or psychologist healthcare provider who holds a current and active license as a physician, physician assistant, nurse practitioner, psychologist, marriage and family therapist, clinical social worker or professional clinical counselor) “Request for Temporary Continuing Education Waiver – Verification of Disability or Medical Condition” Form No. DCA BBS 37A-636 (Revised 08/2022[OAL to insert new revision date]); and,
- Proof of all income earned from work activity during the (minimum) one-year period of disability. If you did not earn any income, provide proof of receiving disability payments, or provide other evidence demonstrating that you did not earn any income from work activity.

**After completing Part 2 of this form, please read the declaration at the bottom of page 3 and sign and date it to complete your application before submitting it to the Board.**

APPLICANT NAME: Last First Middle

**PART 3 – To be Completed by Licensee Regarding ImmEDIATE Family Member's Disability**

1. What is your immediate family member's name? \_\_\_\_\_
2. What is your relationship to your family member? \_\_\_\_\_
3. What is your immediate family member's diagnosed physical or mental disability or medical condition(s)?  
\_\_\_\_\_  
\_\_\_\_\_
4. Was your immediate family member both unable to work and unable to perform activities of daily living without substantial assistance (such as eating, bathing, dressing, housework, shopping, or meal preparation) for at least one year during your current renewal cycle?  
 Yes  No
5. Were you the primary caregiver for your immediate family member for at least one year during your current renewal cycle?  Yes  No
6. Attach completed (by physician or psychologist healthcare provider who holds a current and active license as a physician, physician assistant, nurse practitioner, psychologist, marriage and family therapist, clinical social worker or professional clinical counselor) "Request for Temporary Continuing Education Waiver – Verification of Disability or Medical Condition" Form No. DCA BBS 37A-636 (Revised 08/2022[OAL to insert new revision date]) that includes a copy of the Family Member's written authorization to release protected health information (PHI) for the limited purpose of the licensee's CE waiver application.

***I declare under penalty of perjury under the laws of the State of California that all information submitted on this form and on any accompanying attachments is true and correct. I hereby certify that for at least one year during my previous license renewal period I was unable to complete the continuing education requirements due to one of the reasons listed in Title 16, California Code of Regulations section 1887.2. I understand that providing false information or omitting required information are grounds for disciplinary action.***

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature of Licensee**

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ATTACHMENT C



Board of Behavioral Sciences
1625 North Market Blvd., Suite S200, Sacramento, CA 95834
Telephone: (916) 574-7830
www.bbs.ca.gov



REQUEST FOR TEMPORARY CONTINUING EDUCATION (CE) WAIVER

VERIFICATION OF DISABILITY OR MEDICAL CONDITION

The board must receive this form with the "Request for Temporary Continuing Education (CE) Waiver – Licensee Application" at least SIXTY (60) DAYS PRIOR TO your license expiration date.

Allow 30 days for processing.

READ INSTRUCTIONS BEFORE COMPLETING THIS FORM

Any unanswered item will cause this request to be incomplete. Incomplete requests will not be processed.

(Please type or print clearly in ink)

Form with sections: Part 1 - To be completed by Licensee; NAME: Last, First, Middle; TELEPHONE; EMAIL ADDRESS (OPTIONAL); ADDRESS OF RECORD: Number and Street, DATE OF BIRTH, City, State, Zip-Code; LICENSE NUMBER; CURRENT LICENSE EXPIRATION DATE; REASON FOR WAIVER REQUEST: (Mark one box only); Health - Self; Health - Primary Caregiver of Immediate Family Member; Name of Immediate Family Member.

APPLICANT NAME: Last	First	Middle
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**Part 2 – Health – Self**

**To be Completed by Attending Physician/Psychologist/Healthcare Provider ("Healthcare Provider" means an individual who holds a current and active license as a physician, physician assistant, nurse practitioner, psychologist, marriage and family therapist, clinical social worker or professional clinical counselor.)**

1. What was the individual's diagnosed physical or mental disability or medical condition(s)?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Did the condition(s) substantially limit the individual's ability to perform one or more life activities?     Yes     No

3. Approximate date disability/medical condition(s) began: \_\_\_\_\_

4. Approximate date disability/medical condition(s) resolved, if applicable: \_\_\_\_\_

<u>Attending Physician's/Psychologist's/Healthcare Provider's</u> Name	License <u>Type and</u> Number	Business Telephone	
<u>Attending Physician's/Psychologist's/Healthcare Provider's</u> Address	City	State	Zip Code

***I declare under penalty of perjury under the laws of the State of California that all the information I have submitted on this form and on any accompanying attachments is true and correct.***

Date
**Signature of Physician/Psychologist/Healthcare Provider**

APPLICANT NAME:	Last	First	Middle
-----------------	------	-------	--------

**Part 3 – Health – Licensee’s Immediate Family Member**

**Items #1 - 6** to be Completed by ~~Attending Physician/Psychologist of~~ the Family Member’s Healthcare Provider

**Item #7** to be Completed by the Family Member of the Licensee

1. Immediate Family Member’s Name: \_\_\_\_\_

2. What was the family member’s diagnosed physical or mental disability or medical condition(s)?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Was the family member unable to work for at least one year as a result of the disability or medical condition(s)?  Yes  No

4. Was the family member unable to perform activities of daily living without substantial assistance for at least one year as a result of the disability or medical condition(s)?  Yes  No

5. Approximate date disability/medical condition(s) began: \_\_\_\_\_

6. Approximate date disability/medical condition(s) resolved, if applicable: \_\_\_\_\_

(continued on next page)

APPLICANT NAME:	Last	First	Middle
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**7. The Family Member has provided written authorization below for the release of their protected health information (PHI) for the limited purpose of verification for the Licensee Request for CE Waiver.**

I \_\_\_\_\_ (insert name of licensee’s family member) voluntarily consent to authorize my healthcare provider to complete this form to disclose my health information during the term of this authorization to the Board of Behavioral Sciences for the specific, limited purpose of verification of my disability or medical condition related to the Licensee Request for CE Waiver.

I authorize the release of my health information that my healthcare provider deems necessary to verify my condition. I also authorize my healthcare provider to release any additional information about my condition, if requested by the Board of Behavioral Sciences, for verification, related to the Licensee Request for CE Waiver.

I understand this authorization will remain in effect until the Board of Behavioral Sciences reviews and either grants or denies the Licensee Request for CE Waiver.

I also understand that my healthcare provider and the Board of Behavioral Sciences cannot guarantee that my health information will not be redisclosed to a third party. The third party may not have to follow the restrictions of this authorization or abide by applicable federal and state law governing the use and disclosure of my health information.

\_\_\_\_\_  
Signature of Licensee’s Immediate Family Member

\_\_\_\_\_  
Date

<u>Attending Physician’s/Psychologist’s/Healthcare Provider’s</u> Name	License <u>Type and</u> Number	Business Telephone	
<u>Attending Physician’s/Psychologist’s/Healthcare Provider’s</u> Address	City	State	Zip Code

**I declare under penalty of perjury under the laws of the State of California that all the information I have submitted on this form and on any accompanying attachments is true and correct.**

\_\_\_\_\_ **Date**                      \_\_\_\_\_ **Signature of Physician/Psychologist/Healthcare Provider**

## Notice of Collection of Personal Information

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Submission of the licensee’s personal information, such as name, license number, medical history, and income is mandatory because the Board cannot process the request for the CE waiver without this information. If the licensee requests a CE waiver because they were the primary caregiver for their immediate family member, submission of the family member’s personal information, such as name, medical history, name of health care provider, and family member’s authorization to release medical information is mandatory because the Board cannot process the request for the CE waiver without this information. The personal information provided is for the limited purpose of evaluating and processing the licensee’s request for the CE waiver.

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- To another government agency as required by state or federal law; or
- In response to a court or administrative order, a subpoena, or a search warrant. to another government agency as required by state or federal law; in response to a Public Records

You, and any family member who have provided information on this form, have a right of access to records containing personal information about you maintained by the board, as permitted by the Information Practices Act. For questions about this notice or access to your records, contact the Board at (916) 574-7830 or by email at [BBS.info@dca.ca.gov](mailto:BBS.info@dca.ca.gov). For questions about the Department of Consumer Affairs’ privacy policy or the Information Practices Act, contact the Department of Consumer Affairs, 1625 North Market Blvd., Sacramento, CA 95834 or (800) 952-5210 or email [dca@dca.ca.gov](mailto:dca@dca.ca.gov).