

Professional Fiduciaries Bureau
Post Office Box 989005
West Sacramento, CA 95798-9005
Telephone: (916) 574-7340 FAX (916) 574-8645
Website: www.fiduciary.ca.gov



Professional Fiduciaries Bureau Education Subcommittee Meeting

**Monday, February 3, 2014
9:30a.m. – 11:30a.m.**

**Meeting Location:
Department of Consumer Affairs – HQ1
1625 N. Market Boulevard, 1st Floor Hearing Room
Sacramento, CA 95834**

Subcommittee Members Present

Barbara de Vries, Subcommittee Chair
Kevin Urbatsch, Subcommittee Vice Chair
Prescott Cole

- 1) Call to Order – Barbara de Vries, Subcommittee Chair
- 2) Introductions / Roll Call – Julia Ansel, Bureau Chief
- 3) Approval of Minutes of the Education Subcommittee Minutes from the December 12, 2013 Meeting
- 4) Examination Passage Rates – Julia Ansel, Bureau Chief
- 5) Examination Process Discussion – Sonja Merold, Acting Chief of the Division of Programs and
- 6) Discussion on Dividing Education Hour Requirements by Subject Matter
- 7) Task to be Completed by Subcommittee Members Prior to the Next Meeting
- 8) Future Agenda Items
- 9) Future Meeting Dates
- 10) Adjournment

Note: The Professional Fiduciaries Bureau Advisory Committee may not discuss or take action on any matter raised that is not included in this agenda. The Committee may however decide to place the matter on the agenda of a future meeting.

Notice: The meeting is accessible to the physically disabled. A person who needs disability-related accommodations or modifications in order to participate in the meeting should make a request no later than five working days before the meeting to the Bureau by contacting Angela Bigelow at (916) 574-7341, angela.bigelow@dca.ca.gov or by sending a written request to the Professional Fiduciaries Bureau, 1625 North Market Blvd., Ste. S-209, Sacramento, California 95834. Requests for further information should be directed to Ms. Bigelow at the same address and telephone number.

MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #1 - Call to Order- Barbara de Vries, Subcommittee Chair Agenda Item #2 – Introductions/Role Call – Julia Ansel, Bureau Chief

Education Subcommittee Members:

Barbara de Vries – Subcommittee Chair

Kevin Urbatsch – Subcommittee Vice Chair

Prescott Cole – Governor Appointee – Nonprofit organization advocating on behalf of the elderly

MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #3 – Approval of Minutes of the Education Subcommittee Minutes from the December 12, 2013 Meeting

Attachment #1: December 12, 2013 Education Subcommittee Meeting Minutes

Public Comment:

Attachment #1



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**Professional Fiduciaries Bureau
 Education Subcommittee Meeting
 Thursday, December 12, 2013**

**Myers Urbatsch P.C.
 625 Market Street, 4th Floor
 San Francisco, CA 94105**

Committee Members Present

Barbara de Vries, Subcommittee Chair
 Kevin Urbatsch, Subcommittee Vice Chair
 Prescott Cole, Subcommittee Member

Staff Present

Julia Ansel, Bureau Chief
 Angela Bigelow, Program Analyst

- I. Call to Order – Barbara de Vries, Subcommittee Chair
 The meeting was called to order by Barbara de Vries at 10:04am.
- II. Introductions/Roll Call – Julia Ansel, Bureau Chief
 Those in attendance introduced themselves. Ms. Ansel took roll call and there were three members present.
- III. Approval of Minutes of the Education Subcommittee Minutes from the November 19, 2013 Meeting
 Mr. Urbatsch moved to approve the minutes and written, the motion was seconded by Mr. Prescott. There were none opposed and the motion carried.
- IV. Purpose of Subcommittee – Julia Ansel, Bureau
- Discussion on Committee Developing a Criteria List to Assist Bureau in Evaluating/Approving Providers
 The purpose of the subcommittee is to create criteria for the Bureau to use in order to evaluate new educational providers. The Bureau has had several requests from providers to obtain approval from the Bureau. Applicable laws and regulation were included in the meeting packet to assist the subcommittee members with the creation of this criteria. Mr. Urbatsch asked if current staffing is sufficient to add this to the Bureau's workload.
 - Review of Current Laws and Regulations that pertain to Education
 Ms. Bigelow explained the Bureau has authority to approve courses but does not have a procedure in place and once there is a procedure, the Bureau will determine if more staff is needed. Ms. Ansel stated it will depend on how many requests are made to the Bureau.

All the subcommittee members agreed that having control over which courses are approved would be important for the Bureau.

Ms. Bessey of PFAC will provide vetting formulas and criteria used by PFAC to assist with the subcommittee's review.

V. Internship Discussion – Barbara de Vries, Subcommittee

- **Feasibility of Requiring Internship**
Ms. de Vries would like to see a requirement of internship prior to licensure for Professional Fiduciaries. She has checked with her errors and omissions insurance provider and was told having an intern in her office would be covered by her insurance.
- **Feasibility of Continuing Education Provider Requiring Internship**
In order for the certificate programs to require internship as part of their program, the law would have to be changed to require a certificate program be completed in order to apply for licensure. At this time many students are not completing the certificate programs and it may be because the requirement for licensure is thirty hours.
- **Feasibility of the Bureau Requiring Internship**
The Bureau cannot require an internship program at this time unless it falls within the thirty hours of prelicensing education stated in statute. PFAC will look into pursuing a legislative change in this section.

VI. Specific Subject Matter Requirements for Continuing Education – Prescott

A Professional Fiduciary Licensee must have the ability to navigate a client through California's long-term care system and be able to protect the client from being financially exploited. The educational requirements to become a licensed Professional Fiduciary Licensee should specify that, among the tasks and knowledge a practitioner is expected to possess is a basic knowledge of California's long-term care system, elder financial scams involving unsuitable products or services, and a rudimentary understanding of California senior consumer protection laws.

- **Advocacy**
To become licensed the fiduciary should be exposed to all aspects that may be required and know where to look if more information is needed. The Professional Fiduciary needs to know what to do when a client begins to decline and needs assisted living or nursing care and need to know the difference between the different levels of care.
 1. Nursing Homes
 2. Residential Facilities
 3. Assisted Living Facilities
- **Spotting Scams**
Professionals prey on elderly clients and the Professional Fiduciary needs to have updated training on current scams and what types of services may be unsuitable for their client.
- **Government Benefits and Programs**
A Professional Fiduciary should be aware of and determine which government benefits and programs their client may qualify for. For example, Medi-cal does not require a person to be completely impoverished to qualify. The Professional Fiduciary needs to know the various programs and requirements so that they can best serve the client.

Mr. Cole included fact sheets with helpful information in the meeting packet and basic laws Professional Fiduciaries should be aware to best serve their clients. He would like this components included in the education requirements and believes they would best fit under the ethics section.

VII. Practical Component and Increasing Pre-licensing and Continuing Education Hours Requirements – Kevin Urbatsch, Subcommittee Vice Chair

- Including a Practical Component within the Required Education Hours
This subject was discussed earlier in the meeting.
- Specify within the Hours Requirement the Number or Percentage of Hours Required in Each Subject
The subcommittee discussed possible ways to break up the hour requirements. It was decided that the members will come to the next meeting with the percentage of education they believe should be required for each subject area.
- Increase the Number of Required Hours
As discussed earlier in this meeting, PFAC will look into pursuing a legislative change to allow the Bureau to increase the number of prelicensing hours required.

VIII. Tasks to be Completed by Subcommittee Members Prior to the Next Meeting

Each of the subcommittee members will return to the next meeting with their suggestion of how education hours should be divided into sections and what subject matters should be included in each section.

Ms. de Vries will reach out to the certificate programs for their feedback on requiring internships in the certificate program.

The Bureau staff will ask the DCA Legislative office if it is possible to add legislative changes in the sunset review. The Bureau will also provide updated exam passage rates. Finally, the Bureau will arrange a presentation on the approved process for exam creation and evaluation.

IX. Future Agenda Items

Breaking up education hour requirements

Exam passage rates

Exam presentation

Certificate program feedback on requiring internships

Discussion on appropriate criteria for course approval

X. Future Meeting Dates

February 5, 2014 at 9:00a.m. in Sacramento.

XI. Adjournment

The meeting was adjourned at 12p.m.



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MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #4 – Examination Passage Rates – Julia Ansel, Bureau Chief

Public Comment:

MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #5 – Examination Process Discussion – Sonja Merold, Acting Chief of the Division of Programs and Policy Review

- Attachment #2 - PSI Candidate Information Bulletin
- Attachment #3 - Licensure Examination Validation Policy
- Attachment #4 - Participation in Examination Development Workshop

Public Comment:

Attachment #2



PSI licensure:certification
 3210 E Tropicana
 Las Vegas, NV 89121
 www.psiexams.com

*Before scheduling
 your examination,
 be sure you understand
 the contents of this bulletin.
 please retain and use it as a
 reference when contacting PSI.*

**California Professional Fiduciary
 Licensing Examination**



CANDIDATE INFORMATION BULLETIN

CONTENT OUTLINE

About the Examination	2	Reporting to the Examination Site	4
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Please refer to our web site to check for the most updated information at www.psiexams.com.

ABOUT THE EXAMINATION

Passing the California Professional Fiduciary Licensing Examination is mandatory for licensure as a professional fiduciary in the State of California. The purpose of the examination is to protect consumers by identifying professional fiduciaries that are competent to assume and maintain the responsibilities of managing fiduciary services.

The licensing agency is the Professional Fiduciaries Bureau (Bureau) within the California Department of Consumer Affairs (Department). All questions regarding licensing should be directed to:

Professional Fiduciaries Bureau
P.O. Box 989005
West Sacramento, CA 95798-9005
(916) 574-7340
www.fiduciary.ca.gov

The Center for Guardianship Certification (CGC) is responsible for the development and maintenance of the licensing examination for California Professional Fiduciaries. Furthermore, CGC is responsible to ensure that examination validation testing and measurement methodologies are in compliance with professional standards and California law. This produces an examination that is psychometrically sound and legally defensible.

Ongoing maintenance of the examination by CGC keeps the examination current and accurately measures competency in the required knowledge areas.

All questions regarding the examination should be directed to:

Center for Guardianship Certification
P.O. Box 5704
Harrisburg, PA 17110-5704
(717) 238-4689
<http://www.guardianshipcert.org/>

EXAMINATION ADMINISTRATION

PSI has contracted to administer the California Professional Fiduciary Licensing Examination. PSI provides testing through a network of computer examination centers in California and some out of state sites.

All questions regarding the administration of the examination by PSI or scheduling should be directed to:

PSI licensure:certification
3210 E Tropicana
Las Vegas, NV 89121
(877) 392-6422 • Fax (702) 932-2666
www.psiexams.com

EXAMINATION FORMAT

The examination consists of two parts: one part that is national in scope and one part that is specific to California law. To pass the examination you must receive passing scores on both portions. You will have one hour on each part of the examination.

PASSING THE EXAMINATION

The passing score is based upon minimally acceptable competence criteria that represents the skills required for entry-level practice. The passing score is established by CGC. Passing the examination is required before licensure.

After taking the examination, the Bureau will notify you of your pass status on both sections of the exam via a mailed letter. Once you pass both parts of the examination and fulfill all requirements of the Licensing Application Package, the Bureau will notify you of your approval for licensure. You may also retrieve your examination results from the CGC website by using the examination results number issued to you by CGC.

Upon approval and receipt of the licensing fee, the Bureau will issue you a licensing certificate as a California Professional Fiduciary. When you pass the national portion, CGC will certify you as a Registered Guardian.

APPLYING FOR THE EXAMINATION

To take the examination you must follow these three steps:

First, submit a Licensing Application Package to the Bureau for a determination of eligibility. To receive a Licensing Application Package, visit the Bureau's website at www.fiduciary.ca.gov, or contact the Bureau directly at (916) 574-7340. Once approved to take the examination, the Bureau will issue you an examination eligibility number. You will be eligible for twelve (12) months to take and pass the examination.

Once eligible, submit an Examination Application to CGC. You may download the application off the CGC website at <http://www.guardianshipcert.org/> and submit it completed along with the application fee directly to CGC.

Finally, contact PSI to schedule the examination. You will need your examination eligibility number to complete this process.

SCHEDULING THE EXAMINATION

MAKING AN APPOINTMENT

PSI is responsible for the administration and scheduling of the examination. You may make an appointment to take the examination via the Internet at www.psiexams.com, or by telephone at (877) 392-6422. You must have your examination eligibility number to schedule your appointment.

In most California testing centers, testing does not take place on the following major holidays:

Thanksgiving	Closed November 28 - December 1, 2013
Christmas	Closed December 25, 2013
New Years	Closed January 1, 2014
Martin Luther King	Closed January 20, 2014
Memorial Day	Closed May 24-26, 2014
Independence Day	Closed July 4, 2014
Labor Day	Closed August 30 - September 1, 2014



INTERNET SCHEDULING

You may schedule the examination over the Internet 24 hours a day. The process to register and schedule an appointment for the examination over the Internet is as follows:

- You must complete the PSI Test Registration Form that is available online at the PSI website, www.psiexams.com, by submitting your examination eligibility number, providing your desired examination site and date, and remitting the \$30.50 testing fee to PSI.
- PSI will give you available dates for scheduling your examination at one of the examination sites within five days of your requested date.
- You must choose an examination appointment date to complete your registration.

TELEPHONE SCHEDULING

PSI has two scheduling methods available if you wish to schedule by telephone. First, call PSI 24 hours a day at (877) 392-6422, and schedule using the Automated Registration System. Second, if you wish to contact a live operator, use this same telephone number to contact PSI registrars Monday through Friday between 4:30 AM and 7:00 PM and Saturday, between 8:00 AM and 2:00 PM, Pacific Time, to schedule your appointment for the test. You must provide your examination eligibility number.

RE-TAKING THE EXAMINATION

You may re-take the examination a total of four times not to exceed one examination attempt every thirty (30) days within your 12-month eligibility period as determined by the Bureau.

If you fail one or both portions of the examination, you must re-take the failed portion(s). To re-take any portion of the examination, you must first complete a new CGC Examination Application and remit the appropriate fee to CGC. You must then contact PSI to schedule a new appointment to take the examination. You are responsible for paying the sitting fee to PSI for each re-take: \$22.50 (for one portion) or \$30.50 (for two portions).

CANCELING AN EXAMINATION APPOINTMENT

You may cancel and reschedule an examination appointment without forfeiting your fee *if your cancellation notice is received two (2) days prior to the scheduled examination date*. For example, for a 9:00 a.m. Monday appointment, the cancellation notice would need to be received before 9:00 a.m. on the previous Saturday. You may call PSI at (877) 392-6422. Please note that you may also use the automated system, using a touch-tone phone, 24 hours a day in order to cancel and reschedule your appointment.

NOTE: A voice mail message is not an acceptable form of cancellation.

MISSED APPOINTMENT OR LATE CANCELLATION

If you miss your appointment, you will not be able to take the examination as scheduled. You will forfeit your examination fee, if:

1. You do not cancel your appointment two days before the scheduled examination date;
2. You do not appear for your examination appointment;
3. You arrive after your examination start time; or
4. You do not present proper identification when you arrive for the examination.

EXAMINATION SITE CLOSING FOR AN EMERGENCY

In the event that severe weather or another emergency forces the closure of an examination site on a scheduled examination date, your examination will be rescheduled. PSI personnel will attempt to contact you in this situation. However, you may check the status of your examination schedule by calling PSI ahead of time. Every effort will be made to reschedule your examination at a convenient time as soon as possible. You will not be penalized. You will be rescheduled at no additional charge.

SPECIAL ACCOMMODATIONS

CGC is responsible for the determination and approval of all special accommodation requests.

If you have a physical or mental impairment that substantially limits a major life activity you may be eligible for special accommodations in the testing process to assure that the tests accurately reflect your competency in the required knowledge areas. "Major life activities" include walking, seeing, hearing, speaking, breathing, learning, working, caring for oneself, and performing manual tasks.

If you require special accommodations, you must submit a completed Special Accommodations Request Form to CGC for approval. You may obtain the form off the CGC website at <http://www.guardianshipcert.org/> or by contacting CGC at (717) 238-4689 to request one. This form requires you to describe the nature of your disability and its limitations related to the examination, the type of accommodation or modification requested, and supporting documentation. The supporting documentation must bear the name, professional title, original signature, license number and telephone number of your physician, medical authority or other qualified professional.

PSI is fully compliant with the Americans with Disabilities Act and provides reasonable accommodations for candidates whose request for special accommodations has been granted by CGC. Reasonable accommodations are those that do not fundamentally alter the examination or results. Any auxiliary aids and services provided must be approved by CGC. Scheduling services are available for the hearing-impaired via PSI's Telecommunications Device for the Deaf (TDD) by calling (800) 735-2929.



REPORTING TO EXAMINATION SITE

On the day of the examination, you must arrive at least thirty (30) minutes prior to your scheduled appointment time. This allows time for check-in and identification verification and provides time to familiarize yourself with the examination process. If you arrive late, you may not be admitted to the examination site and you may forfeit your examination registration fee. Even though candidates will be thumb printed, you are still required to comply with any identification requirements established by the appropriate regulatory entity.

REQUIRED IDENTIFICATION AT THE EXAMINATION SITE

You must provide one of the following valid forms of government-issued identification before you may examine:

1. An unexpired State issued drivers license;
2. An unexpired State Department of Motor Vehicles Identification Card;
3. A current U.S. military-issued identification card; or
4. An unexpired passport.

All photographs must be recognizable as the person to whom the identification card was issued. The name on the application must match the photographic I.D. card.

Failure to provide the required identification at the time of the examination without notifying PSI is considered a missed appointment, and you will not be able to take the examination.

IMPORTANT INFORMATION ABOUT TAKING AN EXAMINATION

1. All candidates will have their thumbprint taken during examination check-in and re-entry into the testing room after an approved absence. If a candidate passes the examination, the thumbprint record will be destroyed. If a candidate abandons his or her application for licensure, as determined by the appropriate regulatory authority, the thumbprint will also be destroyed. If a candidate is unsuccessful, the thumbprint record will be retained by PSI to ensure proper identification on any subsequent examination attempts. If the thumbprint doesn't match upon exit and re-entry, the candidate shall be disqualified from the examination, his or her test results invalidated, and the appropriate regulatory entity will be notified of the occurrence. The taking of the thumbprint is an additional measure to enhance examination security. The Department's Office of Examination Resources shall ensure that the appropriate safeguards for the storage and destruction of the thumbprint records are in place.
2. The temperature in the testing room is maintained at a moderate level. Candidates are advised to layer clothing. Acceptable layered clothing includes lightweight shirts, sweaters, and pullovers without pockets. These items must be worn upon check-in, while you wait to enter the testing room, and during your initial seating for the examination.
3. There are timing mechanisms available at the test site and on the computer console to help candidates

keep track of time during the test administration. Watches or other timekeeping devices are not permitted in the examination rooms.

4. Only one candidate will be allowed to take a restroom break at a time. Candidates are required to sign out when you leave the room and when you return. If a candidate's restroom break takes longer than five (5) minutes, a proctor will check on the candidate and will notify the applicable regulatory entity of the occurrence, which will take appropriate action.
5. The following items are not permitted in the examination rooms:
 - Cellular telephones, personal digital assistants (PDAs), recording devices, cameras, pagers, purses, notebooks, notebook computers, reference or readings material, music players, radios, electronic games, calculators, or briefcases.
 - Personal items including watches, backpacks, wallets, pens, pencils, or other writing devices, food, drinks (unless prior approval is obtained by your regulatory entity) and good-luck items.
 - Hats, baseball caps, or visors (with the exception of religious apparel), coats, shawls, hooded clothing, heavy jackets or overcoats.

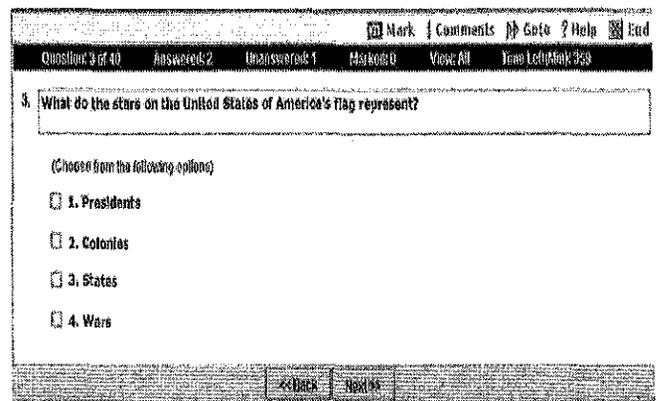
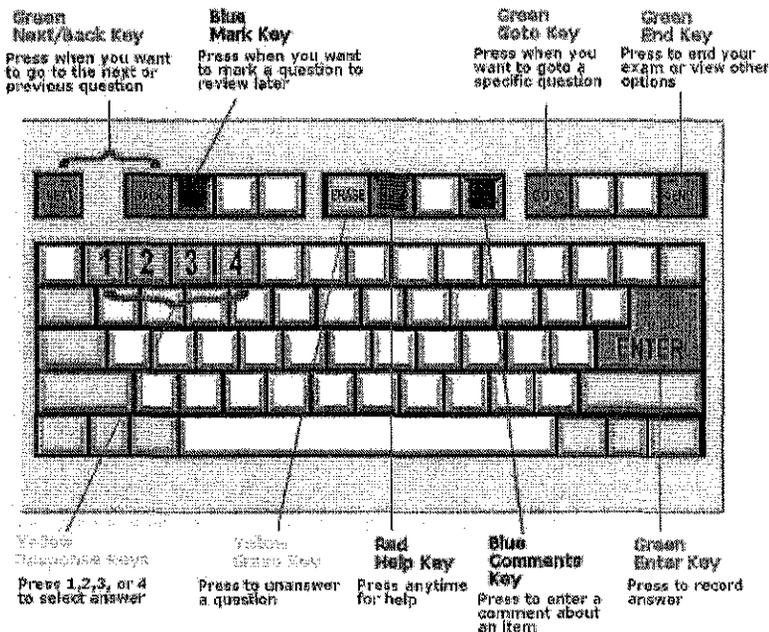
During the check-in process, all candidates will be asked if they possess any of the prohibited items and all candidates will be asked to empty their pockets. If prohibited items are found during check-in, candidates shall return these items to their vehicle or other place of safekeeping. Neither PSI, nor the Department shall be responsible for the items. Any candidate possessing the prohibited items in the examination room shall have his or her test results invalidated, and PSI shall notify the appropriate regulatory entity of the occurrence.

6. Copying or communicating examination content is a violation of PSI security policy and existing law. Either one shall result in the disqualification or invalidation of examination results, the denial of your license, and may subject the candidate to criminal prosecution.



EXAMINATION BY COMPUTER

Taking the PSI examination by computer is simple. You do not need any computer experience or typing skills. You will use fewer keys than you use on a touch-tone telephone. All response keys are colored and have prominent characters. An illustration of the special keyboard is shown here.



IMPORTANT: You have one hour to take each portion of the examination. Within each portion, after you have entered your responses, you will later be able to return to any question(s) and change your response, provided there is still time left on that portion of the examination. Once the time has run out or you have ended the first session of the examination you may not return to that portion.

IDENTIFICATION SCREEN

You will be directed to a semiprivate testing station to take the examination. When you are seated at the testing station, you will be prompted to confirm your name, identification number, and the examination for which you are registered.

TUTORIAL

Before you start your examination, an introductory tutorial to the computer and keyboard is provided on the computer screen. You have up to fifteen (15) minutes to spend on this tutorial and it **DOES NOT** count as part of your examination time. Sample questions are included as part of the tutorial so that you may practice using the keys, answering questions, and reviewing your answers.

One question appears on the screen at a time. During the examination, minutes remaining will be displayed at the top of the screen and updated as you record your answers.

EXAMINATION QUESTION EXAMPLE

During the examination, you should press 1, 2, 3, or 4 to select your answer or press "MARK" to mark it for later review. You should then press "ENTER" to record your answer and move on to the next question. A sample question display follows:

EXAMINATION CONTENT

KNOWLEDGE AREAS

The examination requires you to demonstrate a basic understanding of responsibilities of serving as a professional fiduciary in California. Following is the outline that identifies particular knowledge areas of the examination:

EXAMINATION OUTLINE

1. **Professional Practices:** Knowledge and application of fiduciary principles as they relate to the professional roles of the fiduciary. (16.6%)
 - CA Code of Ethics, NGA Standards of Practice
 - Alternatives to court-appointed fiduciaries
 - Working with a co-fiduciary
 - Confidentiality
 - Conflict of interest
 - Management of fiduciary practice/risk management
 - Fees

2. **Conservatees:** Knowledge of the personal aspects of a conservatee's life and the ability to address those special situations or circumstances affecting the conservatee. (12.6%)
 - Cultural/religious diversity
 - Mental illness/disabilities
 - LPS Conservatorships
 - Difficult clients
 - Family dynamics and concerns
 - Social history, values and beliefs of conservatee

3. **Surrogate decision-making:** Knowledge and application of decision-making principles and limitations in making surrogate decisions. (10.6%)
 - Functional assessment
 - Informed consent
 - Least restrictive alternatives
 - Capacity
 - Limits to fiduciary's authority
 - Fiduciary responsibilities

4. **Legal and courts:** Knowledge and application of laws, courts and legal processes governing fiduciary relationships. (14%)
 - Due process
 - Conservatee's rights
 - Relationship with other officers of the court
 - Court supervision, sanctions, surcharge
 - Modification of conservatorships or trusts, successors
 - Compliance with monitoring systems
 - Financial powers of attorney
 - Mediation

Examination Outline Continued:

5. **Personal Management:** Knowledge and application of the responsibilities of the conservator of the person, including planning, monitoring, reporting, placement and community programs. (9%)
 - Needs assessment
 - Care plans and reports
 - Residential placement
 - Well-being oversight
 - Abuse, neglect and exploitation
 - Death of the conservatee, probate estate
 - Community and professional resources

6. **Financial Management:** Knowledge and application of the responsibilities for financial management of a client's estate and assets. (30%)
 - Inventory/marshal of estate
 - Personal property management
 - Real property management
 - Real estate sales/escrow procedures
 - Asset safekeeping and protection
 - Public benefits
 - Medicare
 - Financial planning, Medi-Cal planning
 - Trusts and trust administration
 - Prudent investor rule, investment principles
 - Consulting with other professionals

7. **Medical decision-making:** Knowledge and application of the specific issues and responsibilities surrounding surrogate medical decisions, including the ability to identify issues that have legal and ethical consequences for both the conservator and the conservatee. (7%)
 - End of life care
 - Special medical decisions/conditions
 - Medical advocacy
 - DNR/withhold/withdraw medical care
 - Durable power of attorney for health care

EXAMINATION SECURITY LAWS

BUSINESS AND PROFESSIONS CODE SECTIONS

123. It is a misdemeanor for any person to engage in any conduct which subverts or attempts to subvert any licensing examination or the administration of an examination, including, but not limited to:
- a. Conduct which violates the security of the examination materials; removing from the examination room any examination materials without authorization; the unauthorized reproduction by any means of any portion of the actual licensing examination; aiding by any means the unauthorized reproduction of any portion of the actual licensing examination; paying or using

professional or paid examination-takers for the purpose of reconstructing any portion of the licensing examination; obtaining examination questions or other examination material, except by specific authorization either before, during, or after an examination; or using or purporting to use any examination questions or materials which were improperly removed or taken from any examination for the purpose of instructing or preparing any applicant for examination; or selling, distributing, buying, receiving, or having unauthorized possession of any portion of a future, current, or previously administered licensing examination.

- b. Communicating with any other examinee during the administration of a licensing examination; copying answers from another examinee or permitting one's



answers to be copied by another examinee; having in one's possession during the administration of the licensing examination any books, equipment, notes, written or printed materials, or data of any kind, other than the examination materials distributed, or otherwise authorized to be in one's possession during the examination; or impersonating any examinee or having an impersonator take the licensing examination on one's behalf.

Nothing in this section shall preclude prosecution under the authority provided for in any other provision of law.

In addition to any other penalties, a person found guilty of violating this section, shall be liable for the actual damages sustained by the agency administering the examination not to exceed ten thousand dollars (\$10,000) and the costs of litigation.

- c. If any provision of this section or the application thereof to any person or circumstances is held invalid, that invalidity shall not affect other provisions or applications of the section that can be given effect without the invalid provision or application, and to this end the provisions of this section are severable.

- 123.5 Whenever any person has engaged, or is about to engage, in any acts or practices which constitute, or will constitute, a violation of Section 123, the superior court in and for the county wherein acts or practices takes place, or are about to take place, may issue an injunction, or other appropriate order, restraining such conduct on application of a board, the Attorney General or the district attorney of the county.

The proceedings under this section shall be governed by Chapter 3 (commencing with Section 525) of Title 7 of Part 2 of the Code of Civil Procedure.

The remedy provided by this section shall be in addition to and not a limitation on, the authority provided for in any other provision of law.

496. A board may deny, suspend, revoke, or otherwise restrict a license on the ground that an applicant or licensee has violated Section 123 pertaining to subversion of licensing examination.

584. No person shall violate the security of any examination, as defined in subdivision (a) of Section 123, or impersonate, attempt to impersonate, or solicit the impersonation of, another in any examination for a license, certificate, or registration to practice as provided in this division, the Osteopathic Act, or the Chiropractic Initiative Act, or under any other law providing for the regulation of any other system or method of treating the sick or afflicted in this state.

EXAMINATION SITE LOCATIONS

PSI examination centers in California:

ANAHEIM

2301 W. LINCOLN AVE, SUITE 252
ANAHEIM, CA 92801
(714) 254-1453

DIRECTIONS FROM LA: TAKE 5 SOUTH EXIT BROOKHURST AND TURN RIGHT. TURN RIGHT ON LINCOLN (PASS A SMALL STREET NAMED MONTEREY), AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

(ORANGE COUNTY) DIRECTIONS FROM SAN DIEGO, IRVINE, MISSION VIEJO, ETC: TAKE 5N EXIT BROOKHURST AND TURN LEFT. TURN RIGHT ONTO LINCOLN (PASS A SMALL STREET NAMED MONTEREY) AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

IF BROOKHURST EXIT IS CLOSED: TAKE 5 N EXIT EUCLID AND TURN LEFT. TURN RIGHT ON LINCOLN (PASS BROOKHURST AND SMALL STREET NAMED MONTEREY) AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

*****KEEP IN MIND THAT THE EUCLID EXIT COMES FIRST AND THEN BROOKHURST.*****

OR 91 FREEWAY: TAKE 91 W EXIT BROOKHURST AND TURN LEFT. TURN RIGHT ONTO LINCOLN (PASS A SMALL STREET NAMED MONTEREY) AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

ATASCADERO

7305 MORRO RD, SUITE 201A
ATASCADERO, CA 93422
(805) 462-8983

FROM US-101 N, TAKE THE CA-41 EXIT- EXIT 219-TOWARD MORRO RD. TURN LEFT ONTO EL CAMINO REAL. Turn LEFT onto CA-41/MORRO RD.

FROM US-101 S, TAKE THE MORRO RD/CA-41 EXIT- EXIT 219, TURN RIGHT ONTO CA-41/MORRO RD.

BURBANK

2950 N. HOLLYWOOD WAY, STE 150
BURBANK, CA 91505

FROM I-5, TAKE THE HOLLYWOOD WAY EXIT. HEAD TOWARDS THE AIRPORT. BUILDING WILL BE ON YOUR LEFT HAND SIDE APPROXIMATELY 0.7 MILES FROM FREEWAY EXIT.

IF TRAVELING WEST ON I-134, EXIT HOLLYWOOD WAY AND HEAD NORTH TOWARDS THE AIRPORT. BUILDING WILL BE ON YOUR RIGHT SIDE IN APPROXIMATELY 4 MILES.

IF TRAVELING EAST ON I-134, EXIT PASS AVENUE. TURN RIGHT ON PASS AVE. TURN LEFT ON WEST ALAMEDA. TURN LEFT ON HOLLYWOOD WAY. YOU WILL BE HEADING NORTH TOWARDS THE AIRPORT. BUILDING WILL BE ON YOUR RIGHT SIDE IN APPROXIMATELY 4 MILES.



CARSON

17420 S. AVALON BLVD, SUITE 205

CARSON, CA 90746

(310) 217-1066

FROM CA-91 E/GARDENA FWY TAKE THE AVALON EXIT. OFF RAMP WILL LEAD YOU ONTO ALBERTONI ST. MAKE A RIGHT ONTO AVALON BLVD AND WE ARE LOCATED ON THE RIGHT HANDSIDE (SAME PARKING LOT AS CARL'S JR).

FROM CA-91 W TAKE THE AVALON EXIT. MAKE A LEFT ONTO AVALON BLVD. MAKE A U-TURN ON AVALON BLVD AND ALBERTONI ST. WE ARE LOCATED ON THE RIGHT HAND SIDE. (SAME PARKING LOT AS CARL'S JR).

EL MONTE

4399 SANTA ANITA AVENUE, SUITE 110

EL MONTE, CA 91731

(626) 279-2705

FROM THE I-10E, TAKE THE SANTA ANITA AVE EXIT. TURN LEFT ONTO SANTA ANITA AVE. MAKE A U-TURN AT EMERY STREET ONTO SANTA ANITA AVE. THE TESTING SITE WILL BE ON THE RIGHT.

FROM I-10 W TOWARD LOS ANGELES, TAKE THE ROSEMEAD BLVD/CA-19 EXIT TOWARD PASADENA. TAKE THE ROSEMEAD BLVD RAMP TOWARD LONG BEACH. MERGE ONTO ROSEMEAD BLVD/CA-19 S. TAKE A LEFT ONTO E. TELSTAR AVE.

FRESNO

351 E. BARSTOW, SUITE 101

FRESNO, CA 93710

(559) 221-9006

FROM CA-41 S, TAKE THE BULLARD AVE EXIT. TURN LEFT ONTO E BULLARD AVE. TURN RIGHT ONTO N FRESNO ST. PASS THROUGH THE INTERSECTION OF FRESNO AND BASTOW AVE. TAKE THE FIRST DRIVEWAY ON THE RIGHT HAND SIDE.

FROM CA-41 N, TAKE THE SHAW AVE EXIT TOWARD CLOVIS. TURN RIGHT ONTO E SHAW AVE. TURN LEFT ONTO N FRESNO ST. TURN LEFT INTO THE LAST DRIVEWAY BEFORE BARSTOW AVE.

TESTING CENTER IS IN THE OFFICE COMPLEX ON THE SW CORNER OF BARSTOW AND FRESNO ST.

HAYWARD

24301 SOUTHLAND DRIVE, SUITE B-1

HAYWARD, CA 94545

(510) 784-1114

FROM I-880 N TOWARD OAKLAND, TAKE THE WINTON AVENUE EXIT. MERGE ONTO W WINTON AVE TOWARD HEALD COLLEGE. TURN LEFT ONTO SOUTHLAND DR.

FROM I-880 S TOWARD SAN JOSE/SAN MATEO BR, TAKE THE WINTON AVE WEST EXIT TOWARD HEALD COLLEGE. MERGE ONTO W WINTON AVE. TURN LEFT ONTO SOUTHLAND DR.

REDDING

2861 CHURN CREEK, UNIT C

REDDING, CA 96002

(530) 221-0945

ON 299 FROM EAST TAKE RAMP ONTO I-5 S. TAKE EXIT #677/REDDING/CYPRESS AVE. TURN LEFT ON E CYPRESS AVE. TURN RIGHT ON CHURN CREEK RD.

ON 299 FROM WEST TURN RIGHT ON MARKET ST (CA-273 S). TURN LEFT ON TEHEMA ST (CA-299 E). CONTINUE TO FOLLOW CA-299 E. TAKE EXIT #2A/RED BLUFF/SACRAMENTO ONTO I-5 S. TAKE EXIT #677/REDDING/CYPRESS AVE. TURN LEFT ON E CYPRESS AVE. TURN RIGHT ON CHURN CREEK RD.

ON I-5 FROM NORTH TAKE EXIT #677/ REDDING/CYPRESS AVE. TURN LEFT ON E CYPRESS AVE. TURN RIGHT ON CHURN CREEK RD
ON I-5 FROM SOUTH TAKE EXIT #677/ REDDING/CYPRESS AVE. TURN RIGHT ON E CYPRESS AVE. TURN RIGHT ON CHURN CREEK RD

ON HWY 44 FROM EAST TAKE RAMP TOWARD VICTOR AVE. TURN LEFT ON VICTOR AVE. TURN RIGHT ON E CYPRESS AVE. TURN LEFT ON CHURN CREEK RD.

FROM ALL DIRECTIONS, FRONT BUILDING IS 2881 CHURN CREEK, DRIVEWAY INTO COMPLEX IS DIRECTLY ACROSS FROM MAJOR MUFFLER ON EAST SIDE OF CHURN CREEK. 2861 IS FIRST BUILDING ON THE LEFT.

RIVERSIDE

7888 MISSION GROVE PARKWAY S., SUITE 130

RIVERSIDE, CA 92508

(951) 789-0358

FROM THE CA-91W TOWARD RIVERSIDE/BEACH CITIES, TAKE THE CENTRAL AVENUE EXIT TOWARD MAGNOLIA CENTER. TURN LEFT ONTO CENTRAL AVE. CENTRAL AVE BECOMES ALESSANDRO BLVD. VEER TO THE RIGHT, THEN STAY STRAIGHT TO GO ONTO TRAUTWEIN RD (YOU WILL PASS COMMUNICATIONS CENTER DR). TURN LEFT ONTO MISSION GROVE PKY W.

FROM THE HIGH DESERT/SAN BERNARDINO AREA 215 S, WHERE THE 60 FWY, 91 FWY AND THE 215 FWY SPLIT, TAKE 215S (SIGNS FOR THE 60 EAST INDIO). TAKE EXIT 27C FOR ALESSANDRO BLVD, TURN RIGHT ONTO E ALESSANDRO BLVD, TURN LEFT ONTO MISSION GROVE PKWY S.

SACRAMENTO

9719 LINCOLN VILLAGE DR.

BUILDING 100, SUITE 100

SACRAMENTO, CA 95827

(916) 363-6455

FROM SAN FRANCISCO/VALLEJO ON I-80 E, TAKE US-50 E TOWARD SACRAMENTO/SOUTH LAKE TAHOE. TAKE BRADSHAW ROAD, EXIT 13, TURN RIGHT ONTO BRADSHAW ROAD. TURN IMMEDIATE LEFT ONTO LINCOLN VILLAGE DR.

SAN DIEGO

5440 MOREHOUSE DRIVE, SUITE 3300

SAN DIEGO, CA 92121

(858) 658-0786

FROM I-805 S, TAKE THE SORRENTO VALLEY RD/MIRA MESA BLVD EXIT. TURN LEFT ONTO MIRA MESA BLVD, TURN LEFT ONTO SCRANTON ROAD. TURN RIGHT ONTO MOREHOUSE DRIVE.

FROM I-805 N TOWARD LOS ANGELES, TAKE THE MIRA MESA BLVD/VISTA SORRENTO PKWY EXIT. TURN RIGHT ONTO MIRA MESA BLVD. TURN LEFT ONTO SCRANTON RD. TURN RIGHT ONTO MOREHOUSE DR.

ADDITIONAL PARKING CAN BE FOUND (on top of the AT&T building) BY CONTINUING ON MOREHOUSE PAST OUR BUILDING AND TURNING LEFT AT THE NEXT DRIVEWAY UP THE HILL

SAN FRANCISCO

150 EXECUTIVE PARK BLVD., STE 1100

SAN FRANCISCO, CA 94134

(415) 330-9700

I-80 W BECOMES US-101 S. TAKE EXIT 429 A TOWARD MONSTER PARK/TUNNEL AVE. TAKE THE RAMP TOWARD 3COM PARK. TURN RIGHT ONTO ALANNA RD. TURN LEFT ONTO EXECUTIVE PARK BLVD.

SANTA ROSA

160 WIKIUP DRIVE, SUITE 105

SANTA ROSA, CA 95403

(707) 544-6723

FROM US-101 N, TAKE MARK WEST SPRINGS/RIVER ROAD EXIT. TURN RIGHT ON MARK WEST SPRINGS. TURN LEFT AT OLD REDWOOD HIGHWAY. TURN RIGHT ON WIKIUP DRIVE. FIRST DRIVEWAY ON RIGHT.

FROM US-101 S, TAKE MARK WEST SPRINGS/RIVER ROAD EXIT. TURN LEFT ON MARK WEST SPRINGS. TURN LEFT AT OLD REDWOOD HIGHWAY. TURN RIGHT ON WIKIUP DRIVE. FIRST DRIVEWAY ON RIGHT.



SANTA CLARA

2936 SCOTT BLVD
SANTA CLARA, CA 95054
(408) 844-0004

FROM US-101 N, TAKE THE SAN TOMAS EXPWY/MONTAGUE EXPWY EXIT- EXIT 392. TAKE THE SAN TOMAS EXPWY RAMP. MERGE ONTO SAN TOMAS EXPY/CR-G4. TURN LEFT ONTO SCOTT BLVD.

FROM I-880 S TOWARD SAN JOSE, TAKE THE MONTAGUE EXPWY EXIT (7). TAKE THE MONTAGUE EXPWY WEST RAMP. MERGE ONTO MONTAGUE EXPY/CR-G4 E. TURN LEFT ONTO E TRIMBLE RD. E TRIMBLE RD BECOMES DE LA CRUZ BLVD. TURN SLIGHT RIGHT ONTO CENTRAL EXPY/CR-G6 W. TURN SLIGHT RIGHT ONTO SCOTT BLVD.

VENTURA

4245 MARKET ST, SUITE 208
VENTURA, CA 93003
(805) 650-5220

FROM US-101N, TAKE THE TELEPHONE ROAD EXIT 65. TURN LEFT ONTO TELEPHONE ROAD. TURN RIGHT ONTO MARKET STREET.

VISALIA

3400 W MINERAL KING AVE, SUITE D
VISALIA, CA 93291
(559) 627-6700

FROM CA-99N, MERGE ONTO CA-198E VIA EXIT 96 TOWARD VISALIA/SEQUOIA NAT'L PARK. TAKE THE EXIT TOWARD DEMAREE STREET. MERGE ONTO W NOBLE AVENUE. TURN LEFT ONTO S COUNTY CENTER DRIVE. TAKE THE 1ST LEFT ONTO W MINERAL KING AVENUE.

WALNUT CREEK

175 LENNON LANE, SUITE 203
WALNUT CREEK, CA 94598
(925) 906-9165

FROM I-5N, KEEP LEFT TO TAKE I-580W TOWARD TRACY/SAN FRANCISCO. MERGE ONTO I-680N VIA EXIT 44B TOWARD SACRAMENTO/WALNUT CREEK/CONCORD. TAKE THE YGNACIO VALLEY ROAD EXIT AND TURN RIGHT. TURN LEFT ONTO LENNON LANE.

OUT-OF-STATE EXAMINATION SITE LOCATIONS

The following out-of state sites will also offer this examination.

ALBUQUERQUE

2301 YALE BLVD, SE
BUILDING C, SUITE 4
ALBUQUERQUE, NM 87106

FROM INTERSTATE 25, TAKE THE GIBSON BLVD EXIT AND TRAVEL EAST ON GIBSON BLVD UNTIL YOU REACH YALE BLVD SOUTHEAST. TURN RIGHT ON YALE BLVD S.E. (HEADING SOUTH), JUST PAST RENARD PLACE AND THEN TURN RIGHT INTO THE COMMERCE CENTER. THE SITE IS ACROSS THE STREET FROM THE WAFFLE HOUSE AND COMFORT INN.

ATLANTA

CIRCLE 75 OFFICE PARK
1000 CIRCLE 75 PARKWAY, SUITE 720
ATLANTA, GA 30339

FROM I-285 BYPASS N, TAKE EXIT- EXIT 51B- TOWARD CHATTANOOGA/GREENVILLE. MERGE ONTO I-285 N / GA-407 N. TAKE THE COBB PKWY / US-41 EXIT- EXIT 19- TOWARD DOBBINS ARB. TURN LEFT ONTO COBB PKWY SE / US-41 N / GA-3 N. TURN SLIGHT RIGHT ONTO CIRCLE 75 PKWY SE.

BOSTON

INNER TECH PARK, 56 ROLAND ST., SUITE 211
BOSTON, MA 02129

FROM NORTH: TAKE I-93 SOUTH. EXIT 28 - BOSTON/SULLIVAN SQ./CHARLESTOWN. MERGE INTO MYSTIC AVE. TAKE I-93S RAMP TO

BOSTON/SULLIVAN SQ./CHARLESTOWN (TAKE RAMP DO NOT GET ON HIGHWAY). MAKE SLIGHT LEFT TURN ON TO MAFFA WAY. MAKE SLIGHT RIGHT TURN ON TO CAMBRIDGE STREET. AT FIRST TRAFFIC LIGHT, MAKE LEFT ON TO CARTER STREET - THERE IS A SIGN FOR INNER TECH PARK. RIGHT ON TO ROLAND STREET. END AT 56 ROLAND STREET (BUILDING ON LEFT, PARKING LOT ON RIGHT). ENTER THROUGH NORTH LOBBY

CHARLOTTE

TYVOLA EXECUTIVE PARK 1
5701 WESTPARK DR, #202
CHARLOTTE, NC 28217

FROM I-77S TOWARDS COLUMBIA, EXIT TYVOLA ROAD (EXIT #5). TURN LEFT AT TYVOLA ROAD. MAKE A RIGHT AT WESTPARK DR. FROM I-77N, EXIT TYVOLA ROAD (EXIT #5). BEAR RIGHT AT TYVOLA ROAD. TURN RIGHT AT WESTPARK DR.

CHERRY HILL

950 N. KINGS HWY, SUITE 301
CHERRY HILL, NJ 08034

FROM THE NEW JERSEY TPKE S, TAKE EXIT #41 PHILADELPHIA/CAMDEN ONTO RT-73 N TOWARD CAMDEN/PHILADELPHIA. TAKE RAMP ONTO I-295 S TOWARD DEL. MEM BR. TAKE EXIT #34B/CHERRY HILL/CAMDEN ONTO MARLTON PIKE(RT-70 W). TURN RIGHT ON KINGS HWY N (RT-41). NOTE BUILDING 950 IS BEHIND BUILDINGS #900 AND #1030.

CHICAGO

332 S. MICHIGAN AVENUE
SUITE 410
CHICAGO, IL 60604

TAKE US-41S WHICH BECOMES I-94E. TAKE THE W JACKSON BLVD EXIT (51F). TURN LEFT ON W JACKSON BLVD. TURN RIGHT ON S MICHIGAN AVE.

CRANBERRY TOWNSHIP

CRANBERRY CORPORATE BUSINESS CENTER
213 EXECUTIVE DR., SUITE 150
CRANBERRY TOWNSHIP, PA 16066

FROM I-79 EXIT CRANBERRY-MARS ROUTE 228, GO WEST. CROSS OVER ROUTE 19 ONTO FREEDOM ROAD. GO THREE TRAFFIC LIGHTS THEN TURN RIGHT ONTO EXECUTIVE DRIVE. BUILDING IS DIRECTLY ACROSS FROM HAMPTON INN.

DALLAS

300 N COIT, SUITE 172
RICHARDSON, TX 75080

FROM 75 SOUTH, TAKE THE BELT LINE ROAD EXIT AND TURN RIGHT ON BELT LINE ROAD. STAY ON BELT LINE ROAD UNTIL YOU REACH COIT. TURN RIGHT ONTO N COIT. THE BUILDING IS ON THE RIGHT HAND SIDE. IF YOU ARE COMING IN FROM LBJ (1635) AND GOING NORTH ON 75, YOU WILL TURN LEFT ONTO BELT LINE AND TURN RIGHT ONTO COIT.

HAMILTON SQUARE AREA

IBIS PLAZA SOUTH
3525 QUAKERBRIDGE ROAD, SUITE 1000
HAMILTON TOWNSHIP, NJ 08619

FROM I-95 S, TAKE EXIT #9/NEW BRUNSWICK (US-1)/EAST BRUNSWICK ONTO RT-18 N TOWARD NEW BRUNSWICK (US-1)/PRINCETON/TRENTON/TOWER CENTER BLVD. TAKE RAMP ONTO US-1 TOWARD TRENTON. TAKE RAMP ONTO CR-533 S TOWARD PROVINCE LINE RD/QUAKER BRIDGE RD/QUAKER BRIDGE RD.

HOUSTON (NORTHWEST)

9800 NORTHWEST FREEWAY
SUITE 200
HOUSTON, TX 77092

FROM HWY 290 DRIVING SOUTHEAST, MERGE ONTO LOOP 610 NORTH. EXIT AT T.C.JESTER AND THEN U-TURN UNDER LOOP 610. STAY ON THE FEEDER ROAD, SHERATON HOTEL IS ON THE RIGHT AS THE ROAD CURVES RIGHT. TURN INTO THE PARKING LOT IMMEDIATELY AFTER THE SHERATON HOTEL AND BEFORE THE OFFICE BUILDING. CENTER IS ON THE 2ND FLOOR.



LAS VEGAS

3210 E TROPICANA AVENUE
LAS VEGAS, NEVADA 89121

FROM I-15 - EXIT EAST ON TROPICANA, TRAVEL APPROXIMATELY 4 MILES, TURN LEFT ON MOJAVE, TURN RIGHT INTO THE PARKING LOT.
FROM I-95 - EXIT WEST ON TROPICANA, TRAVEL APPROXIMATELY 1 MILE, TURN RIGHT ON MOJAVE, TURN RIGHT INTO THE PARKING LOT.

MILFORD

500 BIC DRIVE
SUITE 101

MILFORD, CT 06461

FROM HIGHWAY I-95 EXIT 35. GO TOWARD BIC DRIVE. GO .5 MILES TO 500 BIC DRIVE WHICH IS AT GATE 1 OF THE FORMER BIC COMPLEX. GO TO THE REAR OF THE LOT AND PARK. WALK DOWN THE HILL IN FRONT OF THE BUILDING AND ENTER THE FRONT DOOR. SIGNS WILL DIRECT YOU TO SUITE 101 (PSI).

NASHVILLE

THE OAKS

1100 KERMIT, SUITE 103

NASHVILLE, TN 37217

FROM I-40 EAST, TAKE EXIT ONTO I-24 (EXIT 213-A). TAKE MURFREESBORO ROAD AT THE FIRST EXIT (EXIT 52). STAY IN THE RIGHT LANE ON THE RAMP, AS THE EXIT APPEARS WHILE YOU ARE STILL IN THE CURVE. ON MURFREESBORO, STAY IN THE LEFT LANE. TURN LEFT ONTO KERMIT ST WHEN THERE IS A MCDONALD'S ON YOUR RIGHT. PSI IS IN THE FIRST BUILDING ON YOUR LEFT.

FROM I-40 WEST, TAKE EXIT ONTO BRILEY PARKWAY, TURN LEFT ONTO BRILEY. EXIT ONTO MURFREESBORO RD. STAY IN THE RIGHT LANE. TURN RIGHT ONTO KERMIT ST BETWEEN A FIRESTONE STORE AND SILVERADO DANCE HALL. TURN RIGHT ONTO KERMIT ST. PSI IS IN THE FIRST BUILDING ON YOUR LEFT.

NORTH OREM (PROVO)

581 WEST 1600 NORTH, SUITE C

NORTH OREM, UT 84057

FROM US-89, TURN RIGHT ONTO W CENTER ST/UT-114. MERGE ONTO I-15 N VIA THE RAMP ON THE LEFT TOWARD SALT LAKE. TAKE THE 1600 NORTH EXIT 273. TURN EAST ONTO WEST 1600 NORTH. GO ONE MILE EAST.

NORTH SALT LAKE CITY

25 NORTH 400 WEST, SUITE 7

NORTH SALT LAKE CITY, UT 84054

(THE CITY OF NORTH SALT LAKE NOT SALT LAKE CITY PROPER. THE PSI TEST SITE IS IN DAVIS COUNTY JUST NORTH OF THE FLYING J REFINERY.)

FROM SALT LAKE CITY AND THE SOUTH.

MERGE ON TO I-15N. TAKE EXIT 312 AND MERGE ON TO US89 NORTH FOR ABOUT 1.8 MILES. TURN LEFT ONTO E CENTER ST AND GO WEST FOR ABOUT .6 MILES. TURN RIGHT ON TO 400 W.

FROM THE NORTH

MERGE ONTO I-15 S SALT LAKE. TAKE THE CENTER ST., EXIT 314. TURN RIGHT ONTO W CENTER ST. TURN RIGHT ONTO 400 W.

FROM I-80 EAST MERGE TO I-215 NORTH. TAKE THE REDWOOD RD/UT-68 EXIT 28 AND TURN RIGHT ONTO CENTER STREET.

PHOENIX

5727 N 7TH ST.

SUITE 301

PHOENIX, AZ 85014

FROM I-17 SOUTH EXIT TO BETHANY HOME ROAD. GO LEFT (EAST) ON BETHANY HOME. TURN RIGHT (SOUTH) ON 7TH STREET. THE PSI SITE IS ON THE EAST SIDE OF THE STREET JUST BEFORE MISSOURI. IT IS A 4 STORY GLASS BUILDING.

PORTLAND

205 BUSINESS CENTER, SUITE 201

8383 NE SANDY BLVD

PORTLAND, OR 97220

GET ON I-84 HEADING EAST. TAKE EXIT NO. 5-82ND AVE. TURN RIGHT ON NE MULTNOMAH ST. TURN RIGHT ON NE 82ND AVE. TURN RIGHT ON NE SANDY BLVD. THE SITE IS ON THE LEFT 1/2 BLOCK FROM 82ND AND SANDY.

RICHMOND

MOOREFIELD VI BUILDING

620 MOOREFIELD PARK DRIVE

SUITE 205

RICHMOND, VA 23236

FROM I-64E, TAKE THE PARHAM RD EXIT AND TURN RIGHT. N PARHAM RD/VA-73 S BECOMES VA-150 S/CHIPPENHAM PKWY. MERGE ONTO VA-76 S/POWHITE PKWY. MERGE ONTO MIDLOTHIAN TURNPIKE WEST. TURN LEFT ON MOOREFIELD PARK DR.

SOUTHFIELD (DETROIT AREA) EXAMINATION CENTER

CROSSROADS BUILDING

16250 NORTHLAND DRIVE, SUITE 361

SOUTHFIELD, MI 48075

FROM I-75 NORTH AND SOUTH, EXIT WEST 8 MILE RD. CROSS THE LODGE FWY (HWY 10). TURN RIGHT ON NORTHLAND DRIVE. NORTHLAND DRIVE IS NEXT TO THE NORTHLAND SHOPPING CENTER. FROM SOUTHFIELD FWY NORTH AND SOUTH, EXIT EAST 8 MILE RD. GO EAST ON 8 MILE TO NORTHLAND DRIVE. NORTHLAND DRIVE IS NEXT TO THE NORTHLAND SHOPPING CENTER

WEST DES MOINES

1001 OFFICE PARK ROAD, SUITE 315

WEST DES MOINES, IA 50265

FROM I-235, EXIT 8TH ST/73RD ST AND PROCEED SOUTH. TURN RIGHT ON OFFICE PARK ROAD. TURN RIGHT INTO THE DRIVEWAY.

WEST HARTFORD

45 SOUTH MAIN STREET, SUITE 209

WEST HARTFORD, CT 06107

FROM I-84, EXIT 41, S. MAIN ST. AND PROCEED NORTH APPROXIMATELY 2 MILES. 45 SOUTH MAIN WILL APPEAR ON THE LEFT, DIRECTLY ACROSS THE STREET FROM THE TOWN HALL, BEFORE YOU CROSS FARMINGTON AVENUE. THE ATTENDANT WILL PARK YOUR CAR AT NO CHARGE. TAKE THE ELEVATOR TO THE SECOND FLOOR TO SUITE 209.

WOODBURY

6053 HUDSON RD, SUITE 210

WOODBURY, MN 55125

FROM I-94 GO SOUTH ON CENTURY TO THE FIRST LEFT (WHICH IS THE FRONTAGE ROAD ENTRANCE TO THE COUNTRY INN). ENTER THE OFFICE COMPLEX THROUGH THE SINCLAIR GAS STATION AND ALONG BACK OF THE INN. 6053 IS THE BUILDING DIRECTLY AHEAD. THE ENTRANCE ON THAT (WEST) SIDE IS ACTUALLY ON THE 2ND FLOOR. SUITE 210 IS DOWN THE CORRIDOR TO THE RIGHT. PLEASE USE THE WEST ENTRANCE ON SATURDAYS.



Professional Fiduciaries Bureau
P.O. Box 989005
West Sacramento, CA 95798-9005
(916) 574-7340
www.fiduciary.ca.gov



**STATE OF CALIFORNIA
NOTICE OF ELIGIBILITY**

You are eligible to participate in the examination for licensure as a California Professional Fiduciary. Your address label contains important date information. In the upper left corner of the address label (above your name) is the date you were determined eligible by the Bureau to take the examination; following that is the date by which you must take your examination. You must pass the examination by the date specified on the label or you will need to reapply to the Bureau.

This bulletin is designed to provide you with information regarding examination procedures. To schedule your examination, please refer to the instructions in this bulletin.

Attachment #3

DEPARTMENTAL POLICY



TITLE	LICENSURE EXAMINATION VALIDATION POLICY		
POLICY OWNER	OFFICE OF PROFESSIONAL EXAMINATION SERVICES		
POLICY NUMBER	OPES 12-01	SUPERCEDES	NEW
ISSUE DATE	OCTOBER 1, 2012	EFFECTIVE	IMMEDIATELY
DISTRIBUTE TO	ALL EMPLOYEES		
ORIGINAL APPROVED BY	Original signature on file Denise D. Brown Director		
NUMBER OF PAGES	9	ATTACHMENTS	NONE

POLICY

It is the policy of the Department of Consumer Affairs (DCA) that occupational analyses and examination development studies are fundamental components of licensure programs. Licensure examinations with substantial validity evidence are essential in preventing unqualified individuals from obtaining a professional license. To that end, licensure examinations must be:

- Developed following an examination outline that is based on a current occupational analysis.
- Regularly evaluated.
- Updated when tasks performed or prerequisite knowledge in a profession or on a job change, or to prevent overexposure of test questions.
- Reported annually to the Legislature.

APPLICABILITY

This policy applies to all employees, governmental officials, contractors, consultants, and temporary staff of DCA; and any of its divisions, bureaus, boards, and other constituent agencies. Within this policy, the generic acronym "DCA" applies to all of these entities. For purposes of this policy, "board" shall refer to all boards, bureaus, or committees.

PURPOSE

The purpose of this policy is to meet the mandate of Business and Professions (B&P) Code section 139 (a) and (b) directing DCA to develop a policy regarding examination development and validation, and occupational analyses; and B&P Code section 139 (c) and (d) directing DCA to evaluate and report annually to the Legislature the methods used by each regulatory entity for ensuring that their licensing examinations are subject to periodic evaluations.

On September 30, 1999, the Office of Professional Examination Services (OPES) completed and distributed to its clients an internal publication "Examination Validation Policy" in compliance with B&P Code section 139 (a) and (b). In 2000, DCA policy "Licensing Examinations – Reporting Requirements" (OER-00-01) was established to meet the mandate of B&P Code section 139 (c) and (d). It has since been abolished. This new policy addresses the provisions of all four subsections of B&P Code section 139: (a), (b), (c), and (d).

AUTHORITY

- Business and Professions Code section 139 (a), (b), (c), and (d)
- Business and Professions Code section 101.6
- Government Code section 12944 (a) of the Fair Employment and Housing Act
- Uniform Guidelines on Employee Selection Procedures (1978), adopted by the Equal Employment Opportunity Commission, Civil Service Commission (EEOC), Department of Labor, and Department of Justice
- Civil Rights Act of 1964, as amended

DEFINITIONS

Content domain is the "set of behaviors, knowledge, skills, abilities, attitudes or other characteristics to be measured by a test, represented in a detailed specification, and often organized into categories by which items are classified."¹

Content-related evidence of validity is the evidence that shows the extent to which the content domains of a test are based upon tasks performed in practice and the knowledge, skills, and abilities required to perform those tasks.

Criterion-referenced passing score is the score on a licensure examination that establishes minimum competence. This score is an absolute standard and is not dependent upon the performance of the candidates who sit for the examination.

Entry level indicates minimum acceptable competence for licensure into a profession in the State of California.

Examination development specialists are individuals who are trained, experienced, and skilled in licensure-related occupational analysis; licensure-related examination planning, development, validation, administration, scoring, and analysis; and the professional and technical standards, laws, and regulations related to these tasks.

Examination outline is a detailed description for an examination that specifies the number or proportion of items required to assess each content domain.

Minimum acceptable competence is the level of knowledge, skill, and ability required of licensees that, when performed at this level, would not cause harm to the public health, safety, or welfare.

¹ American Educational Research Association, American Psychological Association, and National Council on Measurement in Education, *Standards for Educational and Psychological Testing*, Washington, DC, 1999, p. 174

Occupational analysis is a method for identifying the tasks performed in a profession and the knowledge, skills, and abilities required to perform those tasks. For occupational licensing, the term occupational analysis is preferred over job analysis or practice analysis because the scope of analysis is across a profession, not an individual job.

Reliable measurement/reliability is “the degree to which test scores for a group of test takers are consistent over repeated applications of a measurement procedure and hence are inferred to be dependable, and repeatable for an individual test taker; the degree to which scores are free of errors of measurement for a given group.”²

Review (“Audit”) of a national licensure examination is an analysis of a nationally developed and administered licensure examination for a profession. The goals of the review are (a) the identification of any critical aspects of the profession as it is performed in California that is not tested in the national examination, but should be tested to ensure safe and competent practice in California and (b) an assessment of whether professional testing standards are being met.

Subject matter experts (SMEs) are practitioners currently possessing an active license in good standing, who are active in their practice, and are representative of the diversity of the professional population in terms of years licensed, practice specialty, ethnicity, gender, and geographic area of practice. When contracting for their services, DCA refers to SMEs as Expert Consultants.

Validation is “the process by which evidence of validity is gathered, analyzed, and summarized.”³

Validity is the “degree to which accumulated evidence and theory support specific interpretations of test scores entailed by proposed uses of a test.”⁴ Validity is not a property inherent in a test; it is the degree to which the decisions based on that test are accurate. For licensing examinations, validity is interpreted as correctly differentiating between persons who are qualified to safely practice a profession from those who are not.

PROVISIONS

A. VALIDATION TOPICS

B&P Code section 139 (b) requires OPES to address eight specific topics, plus any other topics necessary to ensure that licensing examinations conducted on behalf of DCA are validated according to accepted technical and professional standards.

1. AN APPROPRIATE SCHEDULE FOR EXAMINATION VALIDATION AND OCCUPATIONAL ANALYSIS AND CIRCUMSTANCES UNDER WHICH MORE FREQUENT REVIEWS ARE APPROPRIATE

² American Educational Research Association, op.cit., p. 180

³ Society for Industrial Organizational Psychology, *Principles for the Validation and Use of Personnel Selection Procedures*, Bowling Green, OH, 2003, p. 72

⁴ American Educational Research Association, op.cit., p. 184

Occupational Analysis Schedule

Generally, an occupational analysis and examination outline should be updated every five years to be considered current; however, many factors are taken into consideration when determining the need for a shorter interval. For instance, an occupational analysis and examination outline must be updated whenever there are significant changes in a profession's job tasks and/or demands, scope of practice, equipment, technology, required knowledge, skills and abilities, or laws and regulations governing the profession. The board is responsible for promptly notifying the examination development specialist of any significant changes to the profession. This is true both for California-specific and national licensure examination-related occupational analyses.

Examination Validation Schedule

New forms of a licensure examination assist in the legal defensibility of the examination, prevent overexposure of test items, and keep the examination current. The decision to create an examination, or new forms of an examination, is made by the board responsible for the license in consultation with the examination development specialist. The creation of new examination forms depends on the needs of the testing program and the number of people taking the examination.

2. MINIMUM REQUIREMENTS FOR PSYCHOMETRICALLY SOUND EXAMINATION VALIDATION, EXAMINATION DEVELOPMENT, AND OCCUPATIONAL ANALYSES, INCLUDING STANDARDS FOR SUFFICIENT NUMBER OF TEST ITEMS

Boards have the ultimate responsibility to ensure that a licensure examination meets technical, professional, and legal standards and protects the health, safety, and welfare of the public by assessing a candidate's ability to practice at or above the level of minimum acceptable competence.

The inferences made from the resulting scores on a licensing examination are validated on a continuous basis. Gathering evidence in support of an examination and the resulting scores is an on-going process. Each examination is created from an examination outline that is based upon the results of a current occupational analysis that identifies the job-related critical tasks, and related knowledge, skills, and abilities (KSAs) necessary for safe and competent practice. Examinations are designed to assess those KSAs. To ensure that examinations are job-related, SMEs must participate in all phases of examination development.

All aspects of test development and test use, including occupational analysis, examination development, and validation, should adhere to accepted technical and professional standards to ensure that all items on the examination are psychometrically sound, job-related, and legally defensible. These standards include those found in *Standards for Educational and Psychological Testing*, referred to in this policy as the *Standards*; and the *Principles for Validation and Use of Personnel Selection Procedures*, referred to in this policy as the *Principles*.

The *Standards* and *Principles* are used as the basis of all aspects of the policies contained in this document. The EEOC *Uniform Guidelines on Employee Selection Procedures* (1978) provide direction on the legal defensibility of selection-related examinations.

Other professional literature that defines and describes testing standards and influences professionals is produced by the following organizations:

- *American Educational Research Association (AERA)*
- *American Psychological Association (APA)*
- *Council on Licensure, Enforcement, and Regulation (CLEAR)*
- *Educational Testing Service (ETS)*
- *Equal Employment Opportunity Commission (EEOC)*
- *Institute for Credentialing Excellence (ICE)*
- *National Council of Measurement in Education (NCME)*
- *Society for Industrial and Organizational Psychology (SIOP)*

Minimum Requirements for Psychometrically Sound Occupational Analysis

The minimum requirements for a psychometrically sound occupational analysis are as follows:

- Adhere to a content validation strategy or other psychometrically sound examination development method as referenced in a recognized professional source.
- Develop an examination outline from the occupational analysis.
- Gather data from a sample of current licensees in the State of California that represents the geographic, professional, and other relevant categories of the profession.

Minimum Requirements for Psychometrically Sound Examination Development and Validation

The minimum requirements for psychometrically sound examination development and validation are as follows:

- Adhere to the *Standards and Principles*.
- Document the process following recommendations in the *Standards and Principles*.
- Conduct with a trained examination development specialist in consultation with SMEs.
- Use an examination outline and psychometrically sound item-writing guidelines.
- Follow established security procedures.

Standards for Sufficient Number of Test Items

The number of items in an examination should be sufficient to ensure content coverage and provide reliable measurement. Both empirical data and the judgment and evaluation by SMEs should be used to establish the number of items within an examination. The empirical data should include results from an occupational analysis, item analysis, and test analysis.

The item bank for a licensure examination should contain a sufficient number of items such that: 1) at least one new form of the examination could be generated if a security breach occurred; and 2) items are not exposed too frequently to repeating examinees.

3. SETTING PASSING STANDARDS

Passing score standards for licensure examinations must:

- Follow a process that adheres to accepted technical and professional standards.

- Adhere to a criterion-referenced passing score methodology that uses minimum competence at an entry-level to the profession.

An arbitrary fixed passing score or percentage, such as 70 percent, does not represent minimally acceptable competence. Arbitrary passing scores are not legally defensible.

If a board has an appeals process for candidates who are not successful in their examination, once a criterion-referenced passing score has been determined for a multiple-choice examination, the board shall not change a candidate's score without consultation with the examination development specialist.

4. STANDARDS FOR REVIEW OF STATE AND NATIONAL EXAMINATIONS

All licensure examinations appropriated for use in California professions regulated by DCA should be validated according to accepted technical and professional standards, as described elsewhere in these provisions. At a minimum, the following factors must be considered in a review of state and national examination programs:

- Right to access information from all studies and reports from test vendors (local or national)
- Right of state agency to review recent examination
- Description of methodology used to establish content-related validity
- Occupational analysis report and frequency of updates
- Method to ensure standards are set for entry-level practice
- Examination outline and method to link to the occupational analysis
- Information about the sample of practitioners surveyed
- Item development process (experts used, editing methods, etc.)
- Sufficient size of item banks
- Pass-point setting methodology
- Examination security methods; examination administration processes
- Examination reliability
- Pass/fail ratio
- Statistical performance of examinations

California practice must be appropriately represented in an occupational analysis conducted on a national level in order for the results to be valid for examination development in California, and if national examinations are used, the suitability of examination content for California practice must be determined by a review of the occupational analyses, including the demographics of the practitioners upon which it is based.

5. APPROPRIATE FUNDING SOURCES FOR EXAMINATION VALIDATIONS AND OCCUPATIONAL ANALYSES

Budget line items should be designated exclusively for examination development and occupational analyses projects. To assure validity, maintain consistency, preserve security, and ensure the integrity of the examination program, the budget line items need to be continuous appropriations.

Boards should budget for costs associated with examination and occupational analysis development; contracting with a computer-based testing vendor for electronic examination administration; and projecting for expenses associated with travel and per diem for SMEs who participate in examination development and occupational analysis workshops. Boards that administer examinations by paper and pencil should also consider the expense of examination proctors, including their travel and per diem expenses; examination site rental; additional security resources; and printing costs for the preparation guides and examination booklets.

Boards must have the budgetary flexibility to adapt to unexpected or additional program needs. For example, the potential for catastrophic incidents such as a security breach and the cost to replace the compromised examination should be considered in determining overall examination-related costs.

Boards contract via intra-agency contracts (IACs) with OPES for examination-related services. Currently, boards request OPES' services and submit a Budget Change Proposal (BCP) to obtain expenditure authority if they do not already have a budget line item for these expenditures. Boards are then charged, and OPES is reimbursed through the IACs for occupational analyses, national examination reviews, and ongoing examination development, evaluation, construction, and publication services. Consulting and psychometric expertise and test scoring and item analysis (TSIA) services, among others, continue to be funded by distributed administrative costs (pro rata).

6. CONDITIONS UNDER WHICH BOARDS SHOULD USE INTERNAL AND EXTERNAL ENTITIES TO CONDUCT THESE REVIEWS

A board may choose to use external and/or internal resources for licensure examination development and/or review of state and national licensure examinations, and must determine the most logical application of those resources.

OPES is the internal resource for examination review and California-specific examination development services for DCA. OPES also conducts reviews of national examination programs to ensure compliance with California requirements.

If OPES is unable to provide the requested service, external development and review may occur. External examination development or review of a national licensure examination occurs when the board contracts with a qualified private testing firm.

7. STANDARDS FOR DETERMINING APPROPRIATE COSTS OF REVIEWS OF DIFFERENT TYPES OF EXAMINATIONS, MEASURED IN TERMS OF HOURS REQUIRED

The *Standards* provide "a basis for evaluating the quality of testing practices."⁵ These criteria can be used to identify tasks that must be performed in the development and validation of a licensure examination. Costs are applied to the performance of each task, based on its difficulty, available technology, and the complexity of the profession.

⁵ American Educational Research Association, op.cit, p. 1.

OPES has a defined fee schedule that is based on the number of hours to complete each phase of the project. An occupational analysis and an examination development project will require different tasks to be performed; therefore, the number of hours varies from one phase to another. The time and tasks required depends on the profession, type of exam, number of forms, frequency of administration, technology resources, and other factors.

8. CONDITIONS UNDER WHICH IT IS APPROPRIATE TO FUND PERMANENT AND LIMITED-TERM POSITIONS WITHIN A BOARD TO MANAGE THESE REVIEWS

Because examinations are critical to the mandate for consumer protection, it is necessary that if a board provides an examination, it should maintain examination support staff. The number of support staff needed is determined by each board's examination requirements and secured through the budget process.

Factors that may affect change in the number of staff support needed include, but are not limited to the following:

- An increase in the number of times an examination is offered.
- A change of method by which an examination is administered, for example:
 - from paper to computer-based testing administration
 - from oral panel to written examination format
 - from written-only to the addition of a practical examination
- A change of examination administration, for example:
 - from a national to a California-based examination, or vice-versa
 - a change in examination administration vendors
- A unique circumstance such as a breach of examination security.
- A change in legislative mandates.

B. YEARLY REPORTING REQUIREMENTS

B&P Code section 139 (c) specifies that every regulatory board shall submit to DCA on or before December 1 of each year its method for ensuring that every licensing examination is subject to periodic evaluation. These evaluations must include four components:

1. A description of the occupational analysis serving as the basis for the examination.
2. Sufficient item analysis data to permit a psychometric evaluation of the items.
3. An assessment of the appropriateness of prerequisites for admittance to the examination.
4. An estimate of the costs and personnel required to perform these functions.

B&P Code section 139 (d) states that the evaluation specified in section 139 (c) may be conducted either by the Board, Bureau, Committee, OPES, or a qualified private testing firm. OPES compiles this information annually into a report for the appropriate fiscal, policy, and review committees of the Legislature. This report is consolidated into DCA's Annual Report.

VIOLATIONS

Validation ensures that licensing examinations are psychometrically sound, job-related, and legally defensible. Failure to follow the provisions of this policy may result in licensing persons who do not meet the minimum level of competency required for independent and safe practice,

exposing California consumers and DCA's regulatory entities to considerable risk of harm by unqualified licensees.

REVISIONS

Determination of the need for revisions to this policy is the responsibility of OPES at (916) 575-7240. Specific questions regarding the status or maintenance of this policy should be directed to the Division of Legislative and Policy Review at (916) 574-7800.

RELATED DOCUMENTS

Departmental Policy Memorandum "Examination Security": DPM-OPES 10-01

Departmental Policy "Participation in Examination Workshops": OPES 11-01

Attachment #4



TITLE	Participation in Examination Development Workshops		
POLICY OWNER	Office of Professional Examination Services (OPES)		
POLICY NUMBER	OPES 11-01	SUPERSEDES	New
ISSUE DATE	March 1, 2011	EFFECTIVE	IMMEDIATELY
DISTRIBUTE TO	All Executive Officers, Bureau Chiefs, Division Chiefs, and Executive Staff		
ORIGINAL APPROVED BY	Original signature on file Brian J. Stiger, Acting Director Department of Consumer Affairs		
PAGE	1 of 3	ATTACHMENT	None

POLICY

It is the policy of the Department of Consumer Affairs (DCA) that board members, committee members, and instructors not serve as expert consultants in the licensure examination development process.

APPLICABILITY

This policy applies to all employees, governmental officials, consultants, and temporary staff of DCA; and any of its divisions, bureaus, boards, committees and other constituent agencies. Within this policy, the generic acronym "DCA" applies to all of these entities.

PURPOSE

The purpose of this policy is to set forth the restrictions and principles related to participation in the licensure examination development process.

A licensure examination serves a regulatory purpose by ensuring that each candidate who successfully passes an examination for a given profession is qualified to practice in that profession.

Expert consultants are essential to the development of licensure examinations. Their participation ensures that the examinations accurately assess whether candidates possess the minimally acceptable knowledge, skills, and abilities necessary to perform tasks on the job safely and competently. Therefore, the selection of expert consultants by boards, bureaus, and committees critically affects the quality and defensibility of their licensure examinations.

AUTHORITY

Business and Professions (B&P) Code sections 101.6, 123, and 139.

DEFINITIONS

For purposes of this policy, the following definitions apply:

Board members are defined as people who are appointed to a regulatory board, commissioners, exam committee members, and/or other committee members appointed to serve in an advisory capacity to a board or bureau within the statutory authority of the Director of the Department of Consumer Affairs.

An **instructor** is defined as any teacher, trainer, mentor, or other person engaged in formal or informal instruction to candidates for licensure in a profession AND who has a personal and/or financial interest in increased pass rates for his or her student(s) and/or the training institution for which he/she is employed.

An **expert consultant** is defined as a person whose services are retained for, among other tasks, developing, but not proctoring, professional licensing examinations. An expert consultant is a person who actively works in the target profession, has a current license in good standing by the State of California, meets established selection requirements, and is able to articulate specialized technical knowledge related to their profession. In licensure examination development work, expert consultants are referred to as Subject Matter Experts.

PROVISIONS

Due to potential conflict of interest, undue influence, and/or security considerations, board members, and instructors, as defined above, shall not serve as expert consultants for, nor participate in, any aspect of licensure examination development or administration.

In consultation with the relevant board(s); licensure examination developers will determine any exceptions on a case-by-case basis. For instructor participation in examination development workshops, those exceptions will be based on, but not limited to, the following factors:

- Number of hours spent as a licensee relative to the number of hours spent as an instructor;
- Size of the pool of qualified licensees available to attend workshops;
- Availability of licensees for attending workshops; and
- Existence of a licensing/accrediting relationship between the board, bureau, or committee and training schools.

VIOLATIONS

With the concurrence of the relevant board(s) and the approval of management, licensure examination developers will dismiss any expert consultant selected by any board, bureau, or committee who does not meet the provisions of this policy.

REVISIONS

For questions regarding revisions to this policy, please contact OPES at (916) 575-7240. Specific questions regarding the status or maintenance of this policy should be directed to the Division of Legislative and Policy Review at (916) 574-7800.



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MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #6 – Discussion on Dividing Education Hour Requirements by Subject Matter

Public Comment:



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MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #7 – Task to be Completed by Subcommittee Members Prior to the Next Meeting

Public Comment:



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MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #8 – Future Agenda Items

Public Comment:



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MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #9 – Future Meeting Dates



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MEMORANDUM

DATE	February 3, 2014
TO	Education Subcommittee Members Professional Fiduciaries Bureau
FROM	Professional Fiduciaries Bureau
SUBJECT	Agenda Item #10 – Adjournment