

**NORTH CAROLINA BOARD OF OCCUPATIONAL THERAPY  
MAY 13, 2024  
MINUTES**

**REGULAR SESSION**

**Time and Place**

The North Carolina Board of Occupational Therapy met in Regular Session in the offices of the Board on May 13, 2024, at 9:00 a.m.

**Members Present**

Laura Echols, Young Kim, Nicole Blackwell, Erica Dolan, Dr. Kevin Coates and Danielle Ward.

**Others Present**

Charles P. Wilkins, Legal Counsel to the Board and Elizabeth Kirk, Board Administrator.

**Members Absent**

Sarah Rahman.

**Chairperson**

Ms. Echols, Chair, called the meeting to order at 9:00 a.m.

**Conflict of Interest**

Ms. Echols called for any conflicts of interest with the meeting agenda. There were no conflicts or potential conflicts.

**Approval of Minutes**

The March 18, 2024, minutes were approved.

**Approval of Treasurer's Report**

The treasurer's report for March 1, 2024, through April 30, 2024, was discussed and approved as submitted.

**Administrator's Report**

The administrator's report was reviewed and approved as submitted.

### **Legal Services Committee**

Mr. Kim reported the Committee reviewed a bill from Broughton Wilkins Sugg & Thompson, PLLC for the months of March and April 2024 for nineteen (19) disciplinary proceedings. The total hours worked was 34 and the total fees were \$8,500. The Board closed four disciplinary files following the March 2024 Board meeting and currently has fourteen disciplinary files pending. Upon motion made and seconded, the bill was approved for payment.

### **OLD BUSINESS**

The Board reviewed correspondence and general information received following the last Board meeting.

### **Strategic Planning Retreat**

The Board held a retreat on June 14-16, 2019, at the Rizzo Conference Center in Chapel Hill, NC. The Board reviewed the retreat to-do list developed by Board staff and agreed to continue working on the to-do list.

### **NC Legislature**

Mr. Wilkins reported on bills pending in the North Carolina General Assembly.

### **CLEAR**

#### **a. 2024/2025 Meetings**

Board members were advised the 2024 Annual Meeting is meeting in Baltimore, Maryland on September 16-19, 2024. Ms. Echols and Ms. Ward mentioned they may attend.

Board members were also advised that the 2025 International Congress is meeting in Wellington, New Zealand on December 3-5, 2025.

#### **b. 2024-2025 CLEAR Renewal Notice**

Board members reviewed the 2024-2025 CLEAR Renewal Notice. Upon motion made, seconded and passed, the Board agreed to renew its membership.

### **AOTA**

#### **a. 2024 Annual Conference & Expo**

Board members were advised the 2024 Annual Conference & Expo

met in Orlando, Florida on March 21-23, 2024. Ms. Blackwell, Ms. Echols, Mr. Kim and Ms. Rahman attended and reported on the conference.

**b. March 2024 ACOTE Actions**

Board members reviewed an email dated April 24, 2024, regarding the March 2024 ACOTE Actions.

**c. Final draft of AOTA official document**

Board members reviewed an email dated May 8, 2024, regarding the final draft of the recently updated document for Physical Agent, Mechanical, and Instrument-Assisted Modalities within OT Practice.

**NCOTA 2024 Conferences**

Board members were advised the NCOTA 2024 Spring Conference met in Concord, North Carolina on April 13, 2024, and the NCOTA 2024 Fall Conference is meeting in Fayetteville, North Carolina on November 1-3, 2024. The Board agreed to continue discussion on presenting at the fall conference.

**NBCOT State Regulatory Leadership Forum**

Board members were advised the State Regulatory Leadership Forum is meeting virtually on September 10-11, 2024.

**FARB 2024 Conference**

Board members were advised the Innovation of Competency Conference is meeting in Atlanta, Georgia on September 19-21, 2024.

**OT Compact Updates**

Ms. Ward provided an update to the Board on the progress of the OT compact. The Board reviewed the letter of support sent to Amanda Perry, Executive Director for the OTCC, in support of the data system development.

**Email from NC PT Board regarding vision therapy**

Board members reviewed an email dated March 8, 2024, from the NC Physical Therapy Board regarding vision therapy as well as the minutes dated April 25, 2024 for the Vision Therapy Committee meeting. The Board suggested a few changes and agreed to send the response to the NC Physical Therapy Board.

**Response to Eileen Hume regarding NC law**

Board members reviewed an email dated March 22, 2024, from Mr. Wilkins to Ms. Hume regarding NC law.

**Response to Rochelle Masudal regarding license renewal**

Board members reviewed an email dated March 22, 2024, from Mr. Wilkins to Ms. Masudal regarding license renewal requirements.

**Response to Amanda Olson regarding prescribing DME**

Board members reviewed an email dated March 19, 2024, from Mr. Wilkins to Ms. Olson regarding prescribing DME.

**Response to Audra Killingsworth regarding pessaries and prescribing DME**

Board members reviewed an email dated March 19, 2024, from Mr. Wilkins to Ms. Killingsworth regarding pessaries and prescribing DME.

**NEW BUSINESS**

**Emails from Carolina Co regarding soft tissue mobilization**

Board members reviewed an email dated March 15, 2024, regarding the Board's stance on soft tissue mobilization techniques and standards for education and training and agreed to provide Rules .0801 through .0805 and to reiterate the Board does not approve continuing education courses or providers.

**Email from Alyssa Pittman regarding splinting**

Board members reviewed an email dated April 4, 2024 regarding splinting and agreed it is appropriate for an OTA to create a splint and when the patient needs follow-up for splint checks, donning, doffing and training, the OTA can write up their splinting fabrication, and then the supervising OT would evaluate, add documentation on frequency for follow up and goals, so long as the OTA is trained and competent to utilize the splinting technique and such training and competence has been demonstrated and documented.

**Email from Bambi Alley regarding scope of practice**

Board members reviewed an email dated April 23, 2024, regarding scope of practice questions and agreed listening to heart, lung and bowel sounds is within the scope of practice of occupational therapy for the purpose of reporting the findings to the appropriate medical practitioners, so long as the occupational therapy practitioner is

trained and competent to listen to and report such sounds and such training and competence has been demonstrated and documented. Further, performing a urine dip, interpreting the result, and collecting a urine specimen if needed, is not within the scope of practice of occupational therapy.

**Email from Megan Jackson regarding manipulations/manual therapy technique**

Board members reviewed an email dated May 5, 2024, regarding manipulations and manual therapy techniques and agreed those techniques may be performed so long as the OT practitioner is trained and competent and that training and competence is demonstrated and documented.

**Closed Session**

Upon motion duly made, seconded and passed, and pursuant to NCGS 143-318.11(a)(1) and (6) as well as NCGS 143-318.18(6), the Board went into Closed Session at 11:05 a.m.

**Return to Open Session**

The Board returned to Open Session at 11:30 a.m.

**Closed Session Report**

**Disciplinary Matters**

Mr. Wilkins reported the Board was advised in Closed Session that three disciplinary investigations resulted in Consent Orders and ten cases are currently being investigated.

**Adjournment**

The Open Session adjourned at 11:30 a.m.

**Next Meeting**

The next Regular Session meeting will be held at the office of the Board or virtually on July 15, 2024, at 9:00 a.m.

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Laura Echols, Chair

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Nicole Blackwell, Secretary/Treasurer