

**NORTH CAROLINA BOARD OF OCCUPATIONAL THERAPY
SEPTEMBER 22, 2025
MINUTES**

REGULAR SESSION

Time and Place

The North Carolina Board of Occupational Therapy met in Regular Session in the offices of the Board on September 22, 2025, at 9:00 a.m.

Members Present

Nicole Blackwell, Laura Echols, Sarah Rahman, Young Kim, Brad Myers and Danielle Ward.

Others Present

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

Members Absent

Dr. Kevin Coates.

Chairperson

Ms. Blackwell, Chair, called the meeting to order at 9:05 a.m.

Conflict of Interest

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

Approval of Minutes

The July 21, 2025, minutes were approved.

Approval of Treasurer's Report

The treasurer's report for July 1, 2025, through August 31, 2025, 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 July and August 2025 for twelve (12) disciplinary proceedings. The total hours worked was 21.60 and the total fees were \$5,400. The Board closed six disciplinary files following the July 2025 Board meeting and currently has 19 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.

NC Legislature

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

CLEAR

a. 2025 Meetings

Board members were advised the 2025 Annual Meeting was held in Chicago, Illinois on September 15-18, 2025.

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

b. August 2025 CLEAR Update

Board members reviewed an email dated August 21, 2025, regarding the August 2025 CLEAR updates.

AOTA 2026 Annual Conference & Expo

a. 2026 Annual Conference & Expo

Board members were advised the 2026 Annual Conference & Expo is meeting in Anaheim, California on April 23-25, 2026. Ms. Blackwell, Ms. Echols, Mr. Kim and Ms. Rahman may attend.

b. Summer 2025 State Affairs Newsletter

Board members reviewed an email dated July 23, 2025, regarding the Summer 2025 State Affairs Newsletter.

c. August 2025 ACOTE Actions

Board members reviewed an email dated September 4, 2025, regarding the August 2025 ACOTE Actions.

NBCOT State Regulatory Forum

Board members were advised the NBCOT State Regulatory Forum was held virtually on September 9-10, 2025. Ms. Echols, Mr. Kim and Ms. Kirk attended and reported on the conference.

NCOTA 2025 Fall Conference

Board members were advised the NCOTA 2025 Fall Conference will be held in Charlotte on October 24-25, 2025. The Board discussed their presentation and including an update on the OT compact. Ms. Blackwell, Ms. Echols, Mr. Myers and Ms. Rahman plan to attend the conference.

OT Compact Updates

Ms. Ward provided an update on the progress of the OT compact. Board staff contacted the NC SBI regarding the background check process and informed the Board a response should be reviewed within the next few months. Board staff also met with IT to get feedback on how this process can be implemented with the current database system and informed the Board that the rule-making process will need to begin in order to implement a fee or background check.

Response to Catherine Moore regarding request for data

Board members reviewed an email dated July 22, 2025, from Mr. Wilkins to Ms. Moore regarding a request for data.

Response to Leslie Wolff regarding AI for documentation

Board members reviewed an email dated July 22, 2025, from Ms. Kirk to Ms. Wolff regarding AI for documentation.

Email from Mark Kevern regarding discharge summaries

Board members reviewed an email dated July 22, 2025, from Ms. Kirk to Mr. Kevern regarding discharge summaries.

Response to Shelley Greene regarding OTA/activities therapy position

Board members reviewed an email dated July 22, 2025, from Ms. Kirk to Ms.

Greene regarding OTA supervision and activities therapy position.

NEW BUSINESS

Email from Marisa Oberstein regarding the "Promote OT Challenge"

Board members reviewed emails dated September 9, 2025, from Ms. Oberstein and Mr. Kim regarding the "Promote OT Challenge" and agreed it is not within the purview of the Board to be involved in the initiative and cannot participate in the suggested outreach opportunities.

Email from Samantha Morrell regarding specimen collection

Board members reviewed an email dated September 11, 2025, from Ms. Morrell regarding collecting a urine specimen and agreed it is not within the scope of practice of occupational therapy to collect a urine specimen.

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 10:15 a.m.

Return to Open Session

The Board returned to Open Session at 10:40 a.m.

Allen Caldwell

The Board conducted a hearing on whether Mr. Caldwell violated the Practice Act or Rules of the Board specifically NCGS 90-270.76(a)(2) and (4) as well as Rules .0304(a)(12) by failing to document services rendered and documenting services not rendered. Mr. Caldwell and his attorney appeared for the hearing.

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 4:00 p.m.

Return to Open Session

The Board returned to Open Session at 4:45 p.m.

Closed Session Report

Disciplinary Matters

Mr. Wilkins reported the Board was advised in Closed Session that one disciplinary investigation resulted in a dismissal, five resulted in Consent Orders and nineteen cases are currently being investigated.

Allen Caldwell

The Board reviewed the testimony and evidence presented in Mr. Caldwell's hearing and was of the opinion Mr. Caldwell violated the Practice Act or Rules of the Board specifically NCGS 90-270.76(a)(2) and (4) as well as Rules .0304(a)(12) by failing to document services rendered and documenting services not rendered. The Board agreed Mr. Caldwell shall be placed on probation for one year; he shall complete no less than six hours of continuing competence activities related to ethics and documentation for his 2026 renewal; and he shall pay a civil penalty of \$1000 and disciplinary costs of \$1000 before his period of probation ends.

Adjournment

The Open Session adjourned at 4:45 p.m.

Next Meeting

The next Regular Session meeting will be held at the office of the Board on November 17, 2025, at 9:00 a.m.

Nicole Blackwell, Chair

Sarah Rahman, Secretary/Treasurer