

NORTH CAROLINA BOARD OF OCCUPATIONAL THERAPY
July 20, 2026
MINUTES

REGULAR SESSION

Time and Place

The North Carolina Board of Occupational Therapy met in Regular Session in the offices of the Board on July 20, 2026, at 9:00 a.m.

Members Present

Nicole Blackwell, Young Kim, Brad Myers, Sarah Rahman, Zulena Staton and Danielle Ward.

Others Present

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

Blair Nelson, partner with Broughton Wilkins Sugg & Thompson, LLC, Legal Counsel to the Board, attended the meeting, introduced herself and provided an update on Allen Caldwell's appeal of the Board's decision.

Members Absent

Dr. Surah Grumet.

Chairperson

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

Zulena Staton

Ms. Blackwell administered the Oath of Office and Ms. Staton was sworn in as a new member of the Board.

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 May 18, 2026, minutes were approved.

Approval of Treasurer's Report

The treasurer's report for May 1, 2026, through June 30, 2026, was discussed and approved as submitted.

Approve 2026-2027 Budget

The Board tabled its discussion on a new budget pending its review of the proposed contract with Broughton, Wilkins, Sugg & Thompson, PLLC which is to be discussed later in the agenda. Following approval of the contract, the 2026-2027 budget was approved.

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 May and June 2026 for 15 disciplinary proceedings. The total hours worked were 20.00 and the total fees were \$5,000. The Board closed seven disciplinary files following the May 2026 Board meeting and currently has 21 disciplinary files pending. Upon motion made and seconded, the bill was approved for payment.

Mr. Myers agreed to serve on the committee and the Board agreed that Ms. Rahman serve as Chair of the committee.

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 as well as the periodic review of rules with the Rules Review Commission.

CLEAR 2026 Annual Meeting

Board members were advised the 2026 Annual Meeting is meeting in Portland, Oregon on September 14-17, 2026.

AOTA

a. April 2026 ACOTE Actions

Board members reviewed an email dated May 27, 2026, regarding the April 2026 ACOTE Actions.

b. State Affairs Newsletter

Board members reviewed an email dated July 7, 2026, regarding the State Affairs Newsletter.

c. 2027 Annual Conference

Board members were advised the 2027 Annual Conference is meeting in Boston, Massachusetts on April 8-10, 2027.

NCOTA 2026 Conference

Board members were advised the 2026 Fall Conference is meeting in Greenville, North Carolina on September 18-19, 2026. Board members discussed the NCOTA Fall Conference and agreed to have a booth at the conference. Ms. Dorfman agreed to ask the NCOTA conference committee to contact the Board office regarding the Board's participation.

NBCOT

a. Presentation on updates

A representative from NBCOT provided a presentation to the Board regarding various updates and information on NBCOT.

b. Outreach with Primary Board Administrators

Board members reviewed an email dated May 20, 2026, regarding outreach with board administrators.

c. State Regulatory E-newsletter

Board members reviewed an email dated June 10, 2026, regarding the State Regulatory E-newsletter.

d. State Regulatory Leadership Forum

Board members were advised that the State Regulatory Leadership Forum is meeting virtually on September 22-23, 2026.

e. Important News

Board members reviewed an email dated June 9, 2026, regarding the important news from NBCOT.

OT Compact Updates

Ms. Ward provided an update on the progress of the OT compact.

Update on Periodic Review of Rules

Board staff informed the Board that the final rules review report was approved by the Rules Review Commission at its meeting on May 28, 2026.

NEW BUSINESS

Email from Tyler Harrell regarding OT/OTA practice

Board members reviewed an email dated May 29, 2026, from Mr. Harrell regarding administering assessments in OT/OTA practice and agreed there is no standard way to establish competency for a standardized assessment. The OTA contributes to the evaluation process of the OT by implementing specifically delegated assessments for which service competency has been established and documented. When deemed competent to conduct an assessment, an OTA is only able to administer and score the assessment. The OTA is not allowed to interpret any results or make recommendations based on the results of the assessment. For an assessment that requires pivoting mid-exam, has a ceiling of three consecutive errors, or has branching paths, the OTA can determine when to stop or how to proceed and that is not considered "interpreting" but is part of administering and scoring the assessment. An OTA shall determine competency before writing progress notes on patients. Progress notes are permissible for an OTA to perform even though the term "assessment" is a part of a SOAP note. A co-signature by an OT is not sufficient of itself of appropriate OT supervision.

Email from Megan Spicer regarding DBT courses

Board members reviewed an email dated May 30, 2026, from Ms. Spicer regarding DBT courses and agreed an OT practitioner may take dialectical behavioral therapy (DBT) courses and may incorporate the principles of such therapy into your practice of occupational therapy in North Carolina so long as the interventions relate to your practice of occupational therapy. The OT practitioner may incorporate the principles of such therapy into their practice without the supervision or co-signature of a psychological practitioner. Also, if the OT practitioner wants to hold themselves out as a Dialectical Behavioral Therapy Practitioner or bill for such services separately from their practice of occupational therapy, they will need to be licensed as a DBT practitioner.

Email from Kala Wilkins regarding ABA services

Board members reviewed an email dated June 18, 2026, from Ms. Wilkins regarding ABA services and agreed to respond following a meeting with other NC professional healthcare licensing boards to discuss how the services provided within the scope of practice of ABA therapy might complement the scopes of practice of other healthcare professions. The Board does not currently have any existing opinions or policy statements addressing the distinction between OT and ABA services.

Email from Samantha Heidenreich regarding Exercise With Oxygen Therapy

Board members reviewed an email dated July 6, 2026, from Ms. Heidenreich regarding EWOT and agreed the use of EWOT is within the scope of practice of a licensed OT in NC when used as an adjunct to skilled OT interventions and functional therapeutic exercise, as long as the use of EWOT is beneficial, not harmful to the client, an OT may independently initiate and administer EWOT without a MD's order and the OT must be trained and competent to use EWOT and the training and competency must be demonstrated and documented. Also, the Board does not have any specific education, competency, supervision, documentation, facility, or safety requirements to recommend.

2027 Board meeting dates

The Board discussed and approved the 2027 Board meeting dates: January 11, 2027, March 15, 2027, May 17, 2027, July 19, 2027, September 20, 2027 and November 15, 2027.

Election of Board officers

Board members were nominated and officers were elected: Young Kim was elected Chair, Brad Myers was elected Vice Chair and Sarah Rahman was elected Secretary/Treasurer.

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 10:30 a.m.

Return to Open Session

The Board returned to Open Session at 12:00 p.m.

Closed Session Report

Disciplinary Matters

Mr. Wilkins reported he advised the Board in Closed Session that 21 cases are currently being investigated.

Contract with Broughton, Wilkins, Sugg & Thompson, PLLC

The Board reported the proposed contract with Broughton, Wilkins, Sugg & Thompson, PLLC was approved for fiscal years 2026-2031.

Adjournment

The Open Session adjourned at 1:30 p.m.

Next Meeting

The next Regular Session meeting will be held at the Board office on September 14, 2026, at 9:00 a.m.

Nicole Blackwell, Chair

Sarah Rahman, Secretary/Treasurer