

Oregon Occupational Therapy Licensing Board (OTLB)



Alphabet Soup

Whitney Hooker, OTR/L, CLT

Heather McCarthy, OTR/L

Nancy Schuberg, OTLB Director

November 15, 2024



TODAY'S OBJECTIVES

Understand

Understand the role of the Oregon OT Licensing Board (OTLB).

Distinguish

Distinguish the OTLB from the Occupational Therapy Association of Oregon (OTAO), AOTA and NBCOT.

Recognize

Recognize the types of OT Signatures and Credentials and the importance of representing yourself accurately.

Review

Review the history of national OT credential use.

Discuss

Discuss implications of social media/dual relationships on OT Practice and how to protect your license.



UNDERSTAND THE ROLE OF THE OREGON OT LICENSING BOARD



WHAT DOES THE LICENSING BOARD DO...???

- True or False

- Protect the public ☐
- Mediate employer-employee disputes ☐
- Maintain and set state standards of practice ☐
- Advocate for OTs and OTAs ☐
- Investigate licensee complaints ☐
- Provide educational opportunities for OT Practitioners ☐
- Supervise OT practice and ensure ethical service delivery ☐
- Lobby for OT at the state level ☐
- Provide updates to the OT community on legislative efforts at the state and national level ☐
- Monitor and enforces CE Requirements ☐
- Facilitate educational and networking opportunities for OTs and OTAs across the state ☐
- Review applications and issues licenses to qualified applicants ☐

BOTH!

BOTH!

OREGON OT LICENSING BOARD PRIMARY ROLE



Vision: The board is responsible for protecting the health, safety and welfare of individuals who receive occupational therapy services in Oregon.

Mission Statement: to protect the public by supervising occupational therapy practice; and to assure safe and ethical delivery of occupational therapy services.



ABOUT THE OTLB...

Created in 1977 to regulate the practice of Occupational Therapy in Oregon.

Comprised of two OTs, one OTA and 2 public members. Administrative support from Executive Director and one Admin Assistant.

Govern by state statutes (ORS 675.210-675.340) and OAR Chapter 339 - the State Administrative Rules.

Self-supporting and financed solely from licensure and related fees.



BOARD/ DIRECTOR RESPONSIBILITIES

Generally, supervise OT practice.

Make and enforce rules regulating OT practice.

Review and investigate complaints that fall within the Board's authority.

Take appropriate disciplinary action when violations have occurred.

Authorize disbursement of funds.

Hire staff: 1 full time Director and 1 half time Licensing Specialist.



Reviewing each application, issuing licenses, answering questions, talking to new grads, processing all Renewals, following supervision of OT Assistants, setting up, holding and follow up for board meeting, investigating disciplinary complaints, emergency phone conferences for discipline cases, follow up for licensees on probation with conditions to be sure they are being followed, updating the web site, posting on the Governor's transparency site, updating license information on the Governor's licensee site, going to meetings as Agency head, presenting the budget, processing checks, following legislation, working with Pacific, Linn Benton CC, and OTAO, following AOTA and NBCOT changes, making sure new grads get Limited permits, working with Pacific on Reentry of those out of practice, following performance measures on how quickly we license, timing of disciplinary cases going to the Board, Board Best practices, and customer satisfaction, accounting for checks and monthly Agency budget expenditures, tracking all expenses, board compensation, time sheets, new board members going through Governor's interest form and getting confirmed by the Senate, publishing Agency Diversity and Inclusion (affirmative action) plan, having a Suite 407 Security Plan, Risk management, meeting with other Suite 407 Directors, and meeting with all Agency Health Directors, evaluations of staff supervising and training staff, keeping Desk Manual and Board Policies and Procedures current, audits of Health boards and by Secretary of State's office, writing and posting board minutes and newsletters, following public meeting and records laws, processing all checks, Tracking continuing education and performing audits, writing and filing administrative rules, answering scope of practice questions, answer surveys and provide information requested, send license verifications out to other states for you, and finally answering emails and even the phone

WHAT ELSE DO WE DO?

ACTUALLY QUITE A LOT...



WHAT THE BOARD DOESN'T DO...

Deal with personnel-employer issues.

Answer insurance questions. Consult your manager or payor guidelines for billing related issues.

Advocate for you: Your Association, OTA/O, works for you – become a member and ask them to advocate for you.



OTLB AND PUBLIC MEETING LAW



The OR OT Board is subject to public meeting laws.



Meetings must be announced 2 weeks in advance,



Three or more board members in one location is considered a "quorum" thus board business cannot be discussed unless previously posted.



OTLB Meetings include a closed executive session where licensee complaints are investigated and a public session.



Members of the public are welcome and encouraged to attend the public sessions.



WHO CAN FILE A COMPLAINT TO THE LICENSING BOARD?

Patients/Clients

Family, Friends and
other Stakeholders
of Patients/Clients

Coworkers

Other Health
Professionals

Hospitals/Employers

Other OTPs



Misrepresentation of OT Credentials

Felony Convictions

Unprofessional Conduct/Dual Relationships

DUI convictions

Practicing without a License

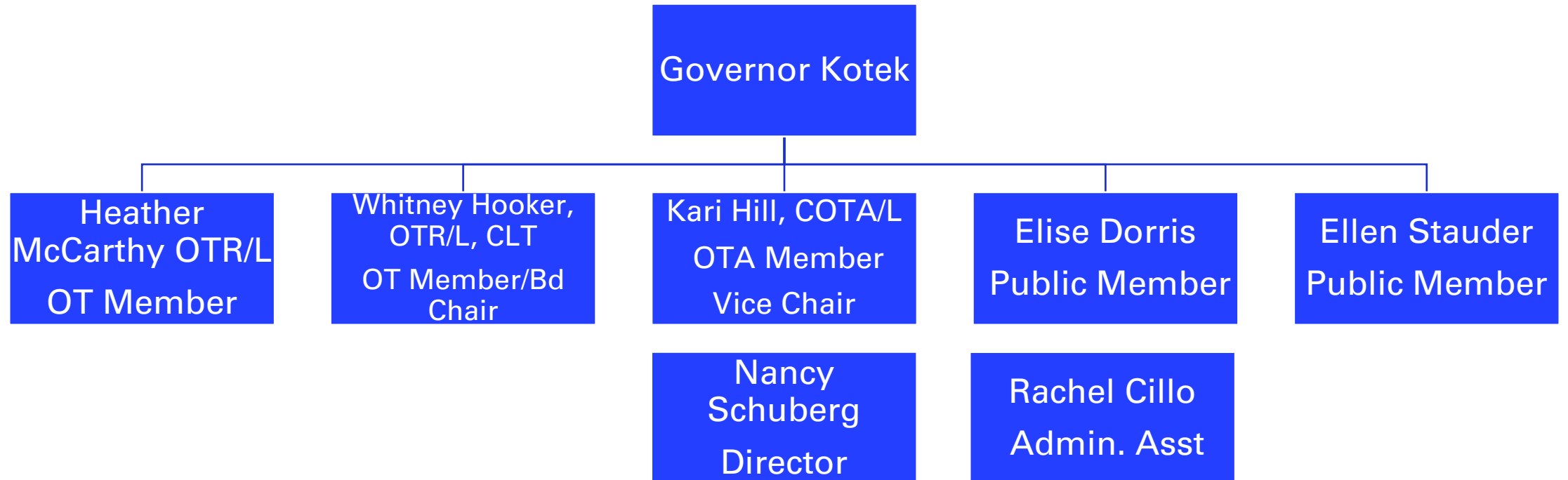
Failed CE Audit

Patient Abandonment

Action Taken: Private letter of concern,
public reprimand, civil penalty,
suspension, probation with conditions,
dismissal

RECENT BOARD CASES

OTLB MEMBERS





NEW BOARD MEMBER INTRODUCTIONS



Elise Dorris is a recently appointed Public Member on the Oregon OT Licensing Board; she is passionate about advocating for nonverbal citizens and committed to overseeing safe and ethical therapy practices. With over 20 years of experience in information technology, policy compliance, financial administration, and operational management, Elise brings a wealth of expertise to her role. She aims to leverage her executive skills and community involvement to make a meaningful impact in the occupational therapy field.



+

•

NEW BOARD MEMBER INTRODUCTIONS



Ellen Stauder is a second year Public Member of the OTLB. She was motivated to join the board after receiving several years of extensive hand therapy. She continues to be impressed by the knowledge, dedication and compassion of each therapist with whom she has worked. She feels their efforts are crucial for the physical success of surgery but also in the patient's process of reintegrating their lives. Ellen taught English and Humanities at Reed College for thirty years and served as Dean of the Faculty; in that capacity, she did extensive work on governance, personnel issues, and curriculum. She worked with the Reed College board regularly and had experience with several other educational boards. She sees her role on the board not only in service of the public but in the advancement of occupational therapists and the significant work they do.



NEW BOARD MEMBER INTRODUCTIONS



Heather McCarthy is honored to be appointed as one of two Occupational Therapists on the OTLB in 2024. Heather lives in Corvallis, Oregon and works as a Director of Regulatory Administration for a nationwide rehab provider in a variety of settings. Heather has been an OT for 23 years and has lived and worked as an OTR in Michigan, California, Arizona, and Oregon. Her patient care experience has been primarily in skilled nursing facility settings and acute rehab units of hospitals. She has a passion for helping to ensure excellent rehab care is received by older adults and working to see that services are reimbursed accurately according to payer guidelines. Heather worked as a Reimbursement Appeals Specialist for 15 years conducting appeals both in writing and orally by telephone to United States Administrative Law Judges. She is eager as a new Board member to support the OT profession in Oregon.

THANK YOU KARI HILL, COTA, ATP FOR 8 YEARS OF SERVICE!



The OTLB would like to recognize Kari Hill, COTA and Assistive Technology Professional for her outstanding contributions to the OTLB over the last 7 ½ years. Kari has been an invaluable resource for issues related to supervision and school Occupational Therapy. We are so grateful for her two terms of service and wish her all the best in her personal and professional endeavors when she completes her term on June 30, 2025.

OT BOARD OPENING CALL FOR APPLICANTS

The OR OT Licensing Board will have an opening for an OTA member when Kari Hill completes her second 4 year term of service at the end of June 2025.

- Excellent opportunity to serve the state, the public and your profession.

- Thorough training on roles and responsibilities and a fantastic learning and professional growth opportunity.

The appointment process begins in early 2025 and their term of service begins in July 2025.

- Email nancy.SCHUBERG@otlb.Oregon.gov for more information on the application process.





**DISTINGUISH THE
OREGON OT
LICENSING BOARD
FROM THE OREGON OT
ASSOCIATION, AOTA
AND NBCOT**



PROFESSIONAL ORGANIZATION OVERVIEW

OTLB - State
License
Protects the public

OTAO - State
Association
Promotes the
profession

AOTA – National
Association

NBCOT – National
Certification Board
(Administers the exam)

- OTR/L -certified OT/L-not certified
- COTA/L –certified OTA/L-not certified



OCCUPATIONAL THERAPY ASSOCIATION OF OREGON

Mission

- The mission of OTA0 is to strengthen the occupational therapy profession through advocacy, education, and collaboration.

Values

- Connection
- Empowerment
- Equity
- Sustainability
- Integrity



JOIN THE OT ASSOCIATION OF OREGON!!!

- Currently, there are 238 members of OTAOC and 2,600 licensed OTs and OTAs in Oregon: only 9.2% of licensees are members of the association.
- Membership Benefits:
 - Your membership fee directly impacts OT advocacy at the state level to monitor legislation and directly advocate for OT practitioners via lobbyist, Niki Terzieff
 - Networking opportunities
 - Discounted continuing education
 - Professional resources
- 27 cents/day



AMERICAN OCCUPATIONAL THERAPY ASSOCIATION

- Represents OT Practitioners in the US and territories to advance practice, education and research.
- OT advocacy at national level.
- AOTA differs from state associations by establishing and updating the OT Practice Framework, publishing position statements relative to OT practice, Documentation Standards, Code of Ethics and Scope of Practice Guidelines.
- Many states, including Oregon, follow AOTA Scope of Practice guidelines.



American
Occupational Therapy
Association



NATIONAL BOARD FOR CERTIFICATION IN OCCUPATIONAL THERAPY

Provides national initial and renewal board certification for OTPs in the US

Vision: Certified occupational therapy professionals providing just, equitable, inclusive, and effective evidence-based services across all areas of practice worldwide

Mission: NBCOT strives to serve the public interest in its diversity by advancing just, equitable, and inclusive client care and professional practice through evidence-based certification practices and the validation of knowledge essential for effective and safe practice in occupational therapy

Governed by a board of OTs, OTAs and public members

- Investigates complaints regarding NBCOT Code of Conduct violations

**RECOGNIZE THE TYPES
OF OT CREDENTIALS &
SIGNATURES AND THE
IMPORTANCE OF
REPRESENTING
YOURSELF
ACCURATELY**



OT CREDENTIALS AND SIGNATURES

AOTA Code of Ethics (202) Standards of Conduct Section 5B:

Represent credentials, qualifications, education, experience, training, roles, duties, competence, contributions and findings accurately in all forms of communication.





OT LICENSEE ABBREVIATIONS

OT/L

OTR/L

OT/LP
(Limited
Permit)

COTA/L

OTA/LP

OTA/L

It is your responsibility as a licensee to ensure your credential is correct in print, electronically or on employer marketing material!



WHAT IS A LIMITED PERMIT? (OT/LP, OTA/LP)



Provides a route to practice for OTs and OTAs that have completed their educational program, registered for the NBCOT examination and are waiting to test.



Eligible for 90 days from the date of your NBCOT Authorization to Test notification.



OTs and OTAs with a LP must work under the supervision of an OT and file their OT Supervisor with the OTLB.



Must practice under routine supervision of an OR Licensed Occupational Therapist, meaning direct contact at least every 2 weeks.



Not eligible for renewal, applicants that fail the NBCOT are not eligible.



OTs and OTAs must clearly identify themselves using OT/LP or OTA/LP in their signature.



REVIEW THE HISTORY OF NATIONAL OT CREDENTIAL USE





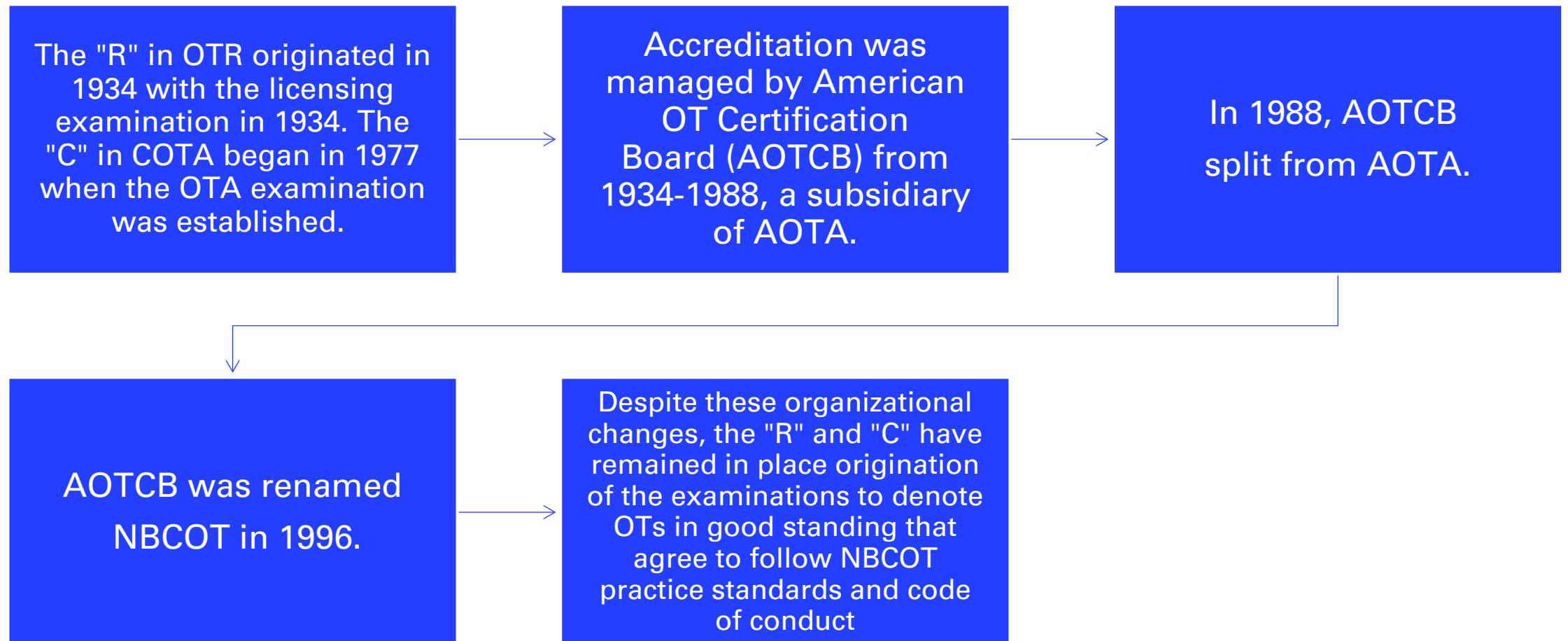
WHAT'S WITH THE "R" AND "C"?

Indicates national certification with NBCOT

OTs and OTAs who complete their ACOTE-accredited educational program and pass their national exam are awarded this credential which expires after 3 years.

If you choose not to renew your NBCOT certification after 3 years, you must drop the "R" from OTR/L to OT/L or the C from COTA/L to OTA/L

NBCOT ACCREDITATION HISTORY





DISCUSS IMPLICATIONS OF SOCIAL MEDIA/DUAL RELATIONSHIPS ON OT PRACTICE AND HOW TO PROTECT YOUR LICENSE



PROTECTING YOUR LICENSE IN THE EVOLVING SOCIAL MEDIA (SM) LANDSCAPE



- As of 2021, 72% of Americans use social media and professional use is now accepted for sharing information, promotion, networking, seeking advice and general professional engagement
- Your role as an OTP and a private individual is likely to meld in the social media landscape.
- AOTA recommends, regardless of privacy settings, that posted content intended for family/friends is appropriate for workplace settings
- Accepting friend requests blurs boundaries between client and professional and viewing a client's SM content may violate boundaries and negatively impact the therapeutic relationship.
- AOTA recommends keeping personal and professional accounts separate

AOTA Ethics Advisory Opinion: Ethics and Social Media



SOCIAL MEDIA AND LICENSE PROTECTION

- A 2021 meta-analysis of healthcare providers (HCPs) and social media use by Rukavina *et al*/found *66.9% to 98.7%* of students in healthcare programs use social media at least once a week.
 - This meta-analysis revealed 3 key benefits of social media use among HCPs
 1. Professional networking and collaboration
 2. Professional education and training
 3. Patient education and health promotion
 - As well as 3 dangers of social media among HCPs:
 1. Loosening accountability through poor quality information and eroding public trust
 2. Risk of compromised confidentiality and HIPPA violations
 3. Blurred boundaries between personal and professional use of SM
- Meta-analysis by Guraya and Yusoff found frequent violation of patient privacy, poor professional integrity and cyberbullying in medical disciplines coupled with limited guidelines and safeguards to protect practitioners, students and patients/clients/consumers.

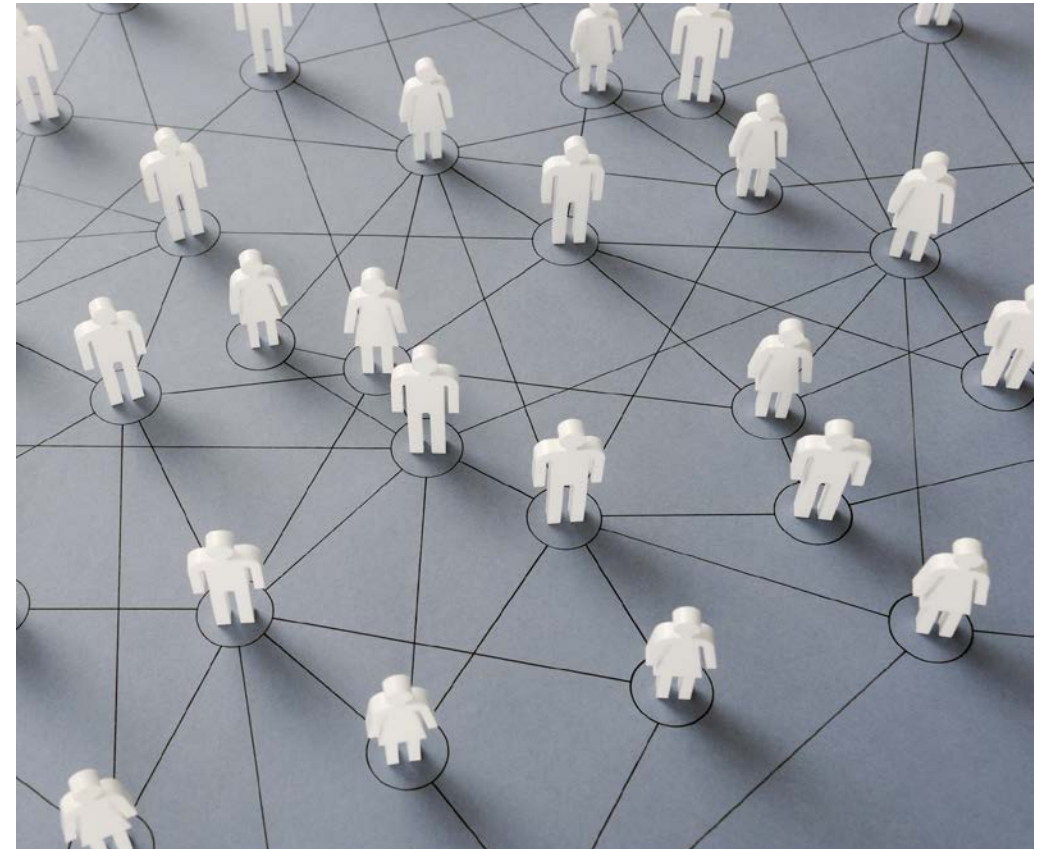
SOCIAL MEDIA, DUAL RELATIONSHIPS AND THREATS TO YOUR LICENSE:



AOTA Code of Ethics
Section 2I: Do not engage in dual relationships or situations in which an Occupational Therapy professional or student is unable to maintain clear professional boundaries or objectivity.

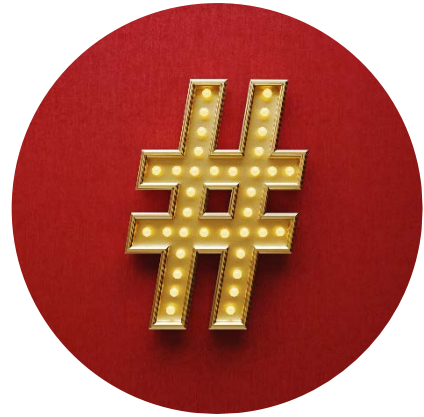
SOCIAL MEDIA, DUAL RELATIONSHIPS AND THREATS TO YOUR LICENSE:

AOTA Code of Ethics
Section 6D: Demonstrate responsible conduct, respect, and discretion when engaging in digital media and social networking, including but not limited to refraining from posting protected health or other identifying information.





Unprofessional conduct: (h)
Failing to follow principals and related standards of conduct as defined in the Occupational Therapy Code of Ethics, by the American Occupational Therapy Association, the the extent they do not conflict with ORS 675.210 through 675.340



KEY TAKEAWAYS

- According to a study by Klee et al, attitudes regarding "friending" patients are more permissive in younger age cohorts, though Rukavina *et al's meta-analysis overwhelming indicates that online interaction between patients/clients and HCPs is not acceptable or endorsed*
- 8 studies cited by Rukavina *et al* have shown unprofessional behavior of HCPs on SM resulting in legal action impacting credibility and licensure
- Mostaghimi and Crotty introduced the concept of "dual citizenship" recommending that HCPs maintain separate personal and professional SM accounts
- AOTA also recommends establishing separate personal and professional accounts for social media



BACK TO BASICS: AOTA ETHICS ADVISORY ON DUAL RELATIONSHIPS



"The primary focus of professional relationships must be on the well-being of the client/student/participant, and professional boundaries must be maintained to achieve that end."



Dual Relationship Golden Rules

Do not exploit relationships as an OTP to further one's personal interests.

Do not engage in dual relationships where you are unable to maintain objectivity and clear professional boundaries.

DUAL RELATIONSHIPS AND RURAL PRACTICE SETTINGS

- A narrative review by Szumer & Arnold found cross-over of relationships in personal and professional settings to be almost inevitable in rural healthcare settings.
- In areas with low referral resources, this can mean potentially withholding care if other practitioners are not available
- In all situations, evaluate the relationship and ask key questions
 1. How long will the therapeutic relationship last?
 2. Is there a risk of exploitation?
 3. How will objectivity be impacted?
 4. Seek consultation from a mentor or supervisor.
 5. Discuss the ramification of the dual relationship with the client.



**THANK YOU FOR YOUR
ATTENTION AND
OUTSTANDING
CONTRIBUTIONS TO
OCCUPATIONAL
THERAPY IN OREGON!**



REFERENCES

American Occupational Therapy Association. (2023). *AOTA ethics advisory opinion: Ethics and social media*. <https://www.aota.org/-/media/corporate/files/secure/practice/ethics/advisory/ethics-and-social-media.pdf>

American Occupational Therapy Association. (2023). *AOTA ethics advisory opinion: Establishing professional boundaries: Where to draw the line*. <https://www.aota.org/-/media/corporate/files/secure/practice/ethics/advisory/professional-boundaries-adv.pdf>

Dewane, C. D., DEd, LCSW, BCD (2010). Therapeutic Boundaries and Dual Relationships in Rural Practice: Ethical, Clinical and Standard of Care Considerations. *Respecting Boundaries – The Don'ts of Dual Relationships*, 10(1), 18.
<https://www.socialworktoday.com/archive/012610p18.shtml>

REFERENCES

Guraya, S.S., Guraya, S. & Yusoff, M.S.B. Preserving professional identities, behaviors, and values in digital professionalism using social networking sites; a systematic review. *BMC Med Educ* **21**, 381 (2021). <https://doi.org/10.1186/s12909-021-02802-9>

National Board for Certification in Occupational Therapy. (2024). *What Does it Mean to Be Board Certified by NBCOT?* National Board for Certification in Occupational Therapy. <https://www.nbcot.org/occupational-therapy/what-is-an-otr-or-cota>

Oregon Department of Justice. (2019, January 1). *II. Public Meetings*. <https://www.doj.state.or.us/oregon-department-of-justice/public-records/attorney-generals-public-records-and-meetings-manual/ii-public-meetings/>

REFERENCES

Oregon Occupational Therapy Licensing Board. (n.d.). *About Us*. Oregon Occupational Therapy Licensing Board.
<https://www.oregon.gov/otlb/Pages/About-Us.aspx>

Occupational Therapy Association of Oregon. (n.d.). *Your Membership Includes*. Occupational Therapy Association of Oregon. <https://www.ota.org/Member-Benefits>

State of Oregon (n.d.). *Rural Health*. Oregon.gov.
<https://www.oregon.gov/omb/topics-of-interest/pages/rural-health.aspx>

REFERENCES

Szumer RTO, Arnold M. The Ethics of Overlapping Relationships in Rural and Remote Healthcare. A Narrative Review. *J Bioeth Inq.* 2023 Jun;20(2):181-190. doi: 10.1007/s11673-023-10243-w. Epub 2023 Mar 28. PMID: 36976435; PMCID: PMC10352392.

Vukušić Rukavina T, Viskiće J, Machala Poplašen L, Relić D, Marelić M, Jokic D, Sedak K. Dangers and Benefits of Social Media on E-Professionalism of Health Care Professionals: Scoping Review. *J Med Internet Res* 2021;23(11):e25770

URL: <https://www.jmir.org/2021/11/e25770>

DOI: 10.2196/25770

Zur, O., PhD (2018). Therapeutic Boundaries and Dual Relationships in Rural Practice: Ethical, Clinical and Standard of Care Considerations. *Journal of Rural Community Psychology*.