

**GEORGIA STATE BOARD OF OCCUPATIONAL THERAPY**  
**Board Zoom Meeting Minutes**  
**Friday, August 20, 2021 – 9:00 a.m.**

The Georgia State Board of Occupational Therapy met via Zoom meeting on Friday, August 20, 2021. The following members were present:

**Board Members Present**

Rachele Branson, OTR/L, Chairperson  
Robert McClellan, OTR/L, Vice Chair  
Pamela Reddick-Collins, OTR/L, Board Member  
Marla Marlowe, OTR/L, Board Member  
Casey Vance, Consumer Board Member

**Administrative Staff Present**

Adrienne Price, Executive Director  
Charlotte Mason, Licensing Supervisor  
Michelle Hornaday, Board Support Specialist  
Meagan Doss, Compliance/Compliance Analyst

**Board Members Absent**

Rafael Salazar, OTR/L, Board Member

**Attorney General's Office**

Mary Brannen, Assistant Attorney General

**Visitors Present**

Dr. Irma Alvarado, PhD, OT/L, FAOTA, Professor, School of Occupational Therapy, Brenau University  
Anneliese Carolyn Roy  
Miles DeWitt  
Kristen Neville, State Affairs Manager, American Occupational Therapy Association (AOTA)

**Call to Order** Ms. Branson established that a quorum of the Board was present, and called the meeting to order at 9:03 a.m.

**OPEN SESSION**

**Board Meeting Agenda**

Mr. Vance motioned, Ms. Reddick-Collins seconded and the Board voted unanimously in favor of the motion to accept the agenda as presented.

**Open Session Minutes – May 14, 2021 Open Session Zoom Meeting Minutes**

Ms. Reddick-Collins motioned, Mr. Vance seconded and the Board voted unanimously in favor of the motion to accept the May 14, 2021 Open Session Zoom Meeting Minutes as presented.

**Open Session Rules Committee**

- 1. August 6, 2021 Zoom Meeting Minutes**
- 2. August 16, 2021 Zoom Meeting Minutes**

Mr. Vance motioned, Ms. Branson seconded and the Board voted unanimously in favor of the motion to accept the August 6, 2021 Rules Committee Zoom Meeting Minutes and the August 16, 2021 Rules Committee Zoom Meeting Minutes as presented.

**Ratification List: May 7, 2021 – August 13, 2021 Licenses, Reinstatements and PAMs**

Ms. Reddick-Collins motioned, Mr. McClellan seconded and the Board voted unanimously in favor of the motion to approve the list of licenses issued from May 7, 2021 – August 13, 2021, licenses issued by reinstatement, the Physical Agent Modalities certifications, and limited permits issued between Board meetings.

**Discussion – The Council of State Governments (CSG) – Welcome to the OT Compact – Dan Logsdon, Director of CSG National Center for Interstate Compacts**

The Board accepts the correspondence in reference to The Council of State Governments (CSG) as information.

### **Discussion – American Occupational Therapy Association (AOTA)**

- 1. Report 6.14 State Actions Affecting Occupational Therapy Response to COVID 19**
- 2. State Legislative Monitoring Report 08.16.21**
- 3. State Regulatory Monitoring Report 08.16.21**

The Board accepts the correspondence in reference to AOTA as information.

Marla Marlow joined the meeting at 9:06 a.m.

### **Rules Committee Report – R. McClellan**

#### **1. Rule 671-3-.06. Limited Permits.Amended\_08162021**

Mr. McClellan stated that the Committee's purpose to amend Rule 671-3-.06. Limited Permits is to align with statute, O.C.G.A. § 43-28-12. The policy purpose of the proposed amendments is to carry out policy objectives that are expressed in the statute which ensures competent practitioners. The rule amendments allow the practitioners to demonstrate competency and to safely treat the public while supervised by a licensed occupational therapist.

The Committee did consider multiple variations and agreed that this language is the most current and concise providing a clear definition of each scenario. No negative economic impact was found. In fact, the applicant will be able to work with the limited permit which provides for some financial gain.

#### **Rule 671-3-.06. Limited Permits. Amended.**

- (1) Upon determination by the Board that all requirements for licensure have been met except for the examination, a ninety (90) day limited permit shall be issued and shall allow the applicant to practice occupational therapy under the supervision of an occupational therapist who holds a current license in this State. Prior to being issued a limited permit, applicants must submit a complete application and fee, to include Form A and any supplemental documents for approval by the Board. This limited permit shall not be ~~issued or renewed if the applicant has ever failed any exam(s) administered or approved by the Georgia Board of Occupational Therapy.~~
- (2) ~~Applicants who have successfully completed a certification examination approved by the Board may be issued a ninety (90) day limited permit. This permit shall allow the applicant to practice occupational therapy, for a period not to exceed 90 days, under the supervision of an occupational therapist who holds a current license in this state.~~ Applicants who are not able to document licensed practice in occupational therapy within the past 5 years may be issued a ninety (90) day limited permit to complete 320 hours of clinical experience under the supervision of a licensed occupational therapist if the applicant has successfully completed a national certification examination approved by the board. Prior to being issued a limited permit, applicants must submit a complete application and fee, to include Form A, and any supplemental documents for approval by the Board.
- (3) ~~The Board may issue an applicant a ninety (90) day limited permit in order to complete the required 320 hours of clinical experience under the supervision of a licensed occupational therapist.~~ Applicants who have failed the examination three times or more; or who have failed to pass the examination within five years of completing the academic requirements for licensure may be issued a ninety (90) day limited permit to meet requirements. This permit shall allow the applicant to practice occupational therapy, for a period not to exceed 90 days, under the supervision of an occupational therapist who holds a current license in this state. Prior to being issued a limited permit, applicants must submit a complete application and fee, to include Form C, and any supplemental documents for approval by the Board.

Supervised work experiences may not begin until the Board approved is granted, a limited permit has been issued to the applicant, and a copy of the limited permit has been provided to the licensed occupational therapist who has been approved to supervise the applicant.

(4)

Limited permits expire ninety (90) days from the date of issuance. If the licensed supervisor approved by the Board can no longer serve in that role, the applicant must submit a new Form C for approval to continue practicing under the limited permit.

(5)

## **2. Rule 671-3-.08. Renewal of License/Penalties/CE Requirements. Amended\_08162021**

Mr. McClellan explained that the purpose of amending Rule 671-3-.08. Renewal of License/Penalties/CE Requirements is to organize and provide a clear understanding of expectations of the Board and to align the rule with the statute. The amendments help to ensure competent practitioners by requiring Continuing Education courses relevant to Occupational Therapy and practice areas.

There were deletions of date references to clean up ambiguities and expirations. The amendments now align with current practice. No economic impact was found.

### **Rule 671-3-.08. Renewal of License/Penalties/Continuing Education Requirements. Amended**

- (1) A license issued by the Board shall expire on March 31st of even numbered years. The license may be renewed upon submission of the renewal application and payment of the required fee, provided all requirements have been met. Refer to fee schedule.
  - (2) A license that is not renewed on or before March 31st of the renewal year shall be deemed lapsed. A licensee may apply for late renewal of a license from April 1st through April 30th of the renewal year upon payment of a late renewal fee, submission of proof of continuing education as established by Board rules and completion of all appropriate forms. ~~As of~~
  - (3) As of May 1<sup>st</sup> of the renewal year, the license of an applicant who has not applied for renewal is expired and revoked by operation of law. An application for reinstatement shall be required as provided for in Rule 671-3-.09 in order to seek reinstatement of a ~~lapsed~~-license to practice in this State. ~~Practicing with an expired license is prohibited by law and practice during this period may result in disciplinary action for unlicensed practice.~~
  - (4) ~~Before or on March 31, 2014 and for renewal cycles after that date, the continuing education requirements contained in this rule will be required for the renewal or reinstatement of a license.~~ Except as otherwise provided, each licensee is required to complete during each two (2) year renewal period a minimum of twenty-four (24) continuing education hours prior to the expiration date of the license. Failure to complete continuing education prior to expiration date can result in disciplinary action.
- Prior approval of continuing education courses is not required. Acceptable professional continuing education activities shall include activities relevant to occupational therapy practice that can be deemed to update or enhance knowledge and skills required for competent performance beyond entry level occupational therapy. ~~A cardiopulmonary resuscitation (CPR) course may not be submitted to satisfy any of the continuing education requirements or employer sponsored compliance coursework.~~

Unacceptable activities include, but not limited to:

(6) (a) Orientation,

(b) Meetings for purposes of policy decisions,

[\(c\) Non-educational meetings.](#)

[\(d\) Annual compliance training](#)

[\(e\) Cardiopulmonary resuscitation \(CPR\) courses.](#)

A continuing education hour is defined as actual time spent in instruction or organized learning experiences excluding meals, breaks, welcome/introductions, and business meetings.

- (7) (a) At least twelve (12) hours of the required twenty-four (24) continuing education hours must be on a topic related to direct patient care. This includes occupational therapy assessment, treatment planning, occupational therapy implementation and diagnostic related information. This must include attendance at live presentations such as workshops, seminars, conferences, or formal academic coursework, or real-time, interactive webinars. To qualify as a real-time, interactive webinar, the licensee must have the ability to ask questions, receive an answer, and interact with other attendees at the time the session is taking place. It may not be a pre-recorded session.
- (b) Each licensee must complete a minimum of two (2) hours of the required twenty-four (24) continuing education hours in the ethics of occupational therapy practice. These hours may be obtained online.
- (c) A maximum of ten (10) of the required twenty-four (24) can be in "General" continuing education hours may be obtained by Level II fieldwork supervision, published professional writing and instructional presentations, pre-recorded electronic or web based courses, formal self-study courses, satellite broadcasts, computer learning activities, webinars, or viewing videotapes in a professional setting. These hours may also be related to administration, supervision, documentation, quality assurance and research.
- (84) An individual who is applying for licensure in Georgia for the first time (never having held a Georgia OT or OTA license) and who is licensed during the second year of the biennium renewal period is not required to meet continuing education requirements for that initial renewal period only.
- (95) ~~Prior approval of continuing education courses is not required.~~ Each licensee randomly selected for a CE audit must submit to the Board supporting documentation as specified in this rule.
- (106) ~~Beginning the licensure renewal biennium of April 1, 2018 through March 31, 2020, p~~Persons licensed to practice as an occupational therapist or an occupational therapy assistant, or persons who file an application for reinstatement of licensure, must submit documentation of completed continuing education courses and experiences for renewal or issuance of a license.
- (11) Licensees and applicants for reinstatement may register earned CE credits for courses and experiences with an online recording and reporting system approved by the Board. Licensees and applicants may register with a Board approved online system ~~prior to April 1, 2018~~ to document CE credits for license renewal and reinstatement.
- (a) The Georgia State Board of Occupational Therapy has approved the online recording and reporting system of CE Broker, Inc. for the purpose of this rule.
- (b) Licensees and applicants shall incur no additional costs from CE Broker, Inc. for using this service.
- (c) Every licensee or applicant subject to the rules of the Georgia State Board of Occupational Therapy shall be deemed to have given such person's consent to the Board and it's representatives to access their continuing competence record retained within the online database for the purposes of auditing and verifying completion of the Board's continuing competency requirements.

- (d) If a licensee or applicant has not registered earned CE credits with the Board approved online recording and reporting system, the licensee or applicant **must** include all CE certificates of completion with the license renewal application or application for reinstatement.
- (127) Procedures for verifying to the Board that the continuing education requirements for licensure renewal have been met:
- (a) Respond ~~appropriately~~ accurately to questions on renewal of license application;
  - (b) Retain original continuing education documentation in personal files to submit to the Board if requested for a continuing education audit;
  - (c) Documentation as specified in this rule must be maintained by the licensee for no less than four (4) years from the beginning date of the ~~licensure~~ renewal period or reinstatement or license.
- (138) Documentation of continuing education which the Board deems as acceptable proof of completion includes the following:
- (a) For continuing education courses that include attendance and participation at a live presentation such as a workshop, seminar, conference or in-service educational program:
    1. A certificate of completion or similar documentation signed by program official, and
    2. A program description including sponsor, course title, date(s), program objectives/learning outcomes, content description, and agenda or schedule. A shortened description may be accepted for programs specifically exempted by the Board such as AOTA and GOTA Conferences;
  - (b) For "General" continuing education as referenced in this rule, if obtained at a conference, workshop or live presentation, required documentation is as noted above. All other must include:
    1. Explanation of the relationship of the activity to occupational therapy and your professional growth.
    2. Date(s) and clock hours of the activity;
    3. Other information as may be requested.
  - (c) ~~For Level II Fieldwork Supervision involving serving as the primary clinical fieldwork educator for Level II occupational therapy or occupational therapy assistant fieldwork students:~~
    1. A description of the fieldwork including name and type of facility, name of the fieldwork educator and times spent in direct supervision of the student is required in order to receive credit for serving as the primary clinical fieldwork educator for Level II occupational therapy and occupational therapy assistant fieldwork students; ~~and;~~
    2. ~~Verification provided by the school to the fieldwork educator with the name of the student, school and dates of fieldwork or the signature page of the completed student evaluation form with evaluation scores and comments blocked out;~~
  - (d) ~~F~~for published professional writing, applied research, and instructional presentations, as referenced in this rule, including first time or significantly revised presentations or an academic class session, workshop, seminar, in-service or professional meeting program session:
    1. Description of the presentation or research including location, title, date, hours of presentation, general content description, and type of audience; and,

2. Verification of the presentation, research or formal thank you note signed by the sponsor or program official.
- (e) Documentation of pre-recorded electronic or web based course, formal self-study courses, satellite broadcasts, computer learning activities or viewing of videotapes in a professional setting must include:
1. Verified instructional time by the course sponsor, a certificate of completion or similar documentation signed by the program official; and,
  2. A program description including sponsor, course title, date(s), program objectives/learning outcomes, and content description.
- (f) Continuing education should be documented on the appropriate board form, available on the Board website, upon request by the Board.

**Cite as Ga. Comp. R. & Regs. R. 671-3-.08**

**Authority:** O.C.G.A. §§ [43-1-4](#), [43-1-19](#), [43-1-25](#), [43-28-7](#), [43-28-8](#), [43-28-13](#), [43-28-14](#).

**History.** Original Rule entitled "Renewal" adopted. F. July 15, 1977; eff. Aug. 4, 1977.

**Repealed:** New Rule of same title adopted. F. July 1, 1982; eff. July 21, 1982.

**Repealed:** New Rule of same title adopted. F. July 11, 1984; eff. July 31, 1984.

**Repealed:** New Rule entitled "Renewal of License/Penalties/Continuing Education Requirements" adopted. F. Apr. 14, 1988; eff. May 4, 1988.

**Amended:** F. Nov. 20, 1991; eff. Dec. 10, 1991.

**Amended:** F. Jan. 28, 1994; eff. Feb. 17, 1994.

**Amended:** F. Feb. 1, 1996; eff. Feb. 21, 1996.

**Repealed:** New Rule of same title adopted. F. Dec. 2, 2002; eff. Dec. 22, 2002.

**Amended:** F. May 4, 2005; eff. May 24, 2005.

**Repealed:** New Rule of same title adopted. F. May 30, 2006; eff. June 19, 2006.

**Amended:** F. Mar. 25, 2008; eff. Apr. 14, 2008.

**Amended:** F. Feb. 20, 2009; eff. Mar. 12, 2009.

**Repealed:** New Rule entitled "Renewal of License/Penalties/Continuing Education Requirements. Amended" adopted. F. Feb. 22, 2012; eff. Mar. 13, 2012.

**Amended:** F. Oct. 2, 2013; eff. Oct. 22, 2013.

**Amended:** F. Jan. 20, 2015; eff. Feb. 9, 2015.

**Note:** Correction of non-substantive typographical error in paragraph (3), removed duplicated wording of "is required" in second sentence, as requested by the Agency. Eff. Oct. 11, 2016.

**Amended:** F. June 1, 2017; eff. June 21, 2017.

**Amended:** F. June 10, 2019; eff. June 30, 2019.

Mr. Vance motioned, Ms. Branson seconded and the Board voted unanimously in favor of the motion to refer Rule 671-3-.06. Limited Permits. Amended. and Rule 671-3-.08. Renewal of License/Penalties/CE Requirements. Amended. to the Attorney General's Office for a Memorandum of Authority, and if no objections, vote to post.

**Discussion – 2022 Board Meeting Dates**

Meetings are scheduled for Fridays at 9:00 a.m. on the following dates:

February 25, 2022  
 May 13, 2022  
 August 19, 2022  
 November 4, 2022

Ms. Reddick-Collins motioned, Mr. McClellan seconded and the Board voted unanimously in favor of the motion to accept the 2022 Board meeting dates as presented.

### **Board Chair's Report – R. Branson**

Ms. Branson addressed the Board staff regarding her concerns on the current timeline for applications processing. Ms. Price responded by explaining changes in computer systems updates which will make processing more intuitive in the long run but are currently causing some lag in the set up and implementation. This can slow down application processing time in the short term.

Additionally, the pandemic issues and personal staffing shortages have come into play. Ms. Price continued that the agency Interim Division Director, Gabriel Sterling, is the Chief Financial Officer for the Georgia Secretary of State, and his leadership has assisted the agency exponentially in gaining proper headway in getting the agency more fluid and efficient.

Ms. Branson addressed where we are in applications.

### **Executive Director's Report – A. Price**

Executive Director's Report presented the Board with statistical data relevant to the processing of applications, the number of licensees, renewal audits and complaints/compliance matters and the status of renewal applications. Additionally, the Executive Director's Report addressed the following:

- OT Licensure Compact
- Changes at the Office
- New Administrative Policy Regarding Applications

Ms. Reddick-Collins motioned, Mr. Vance seconded and the Board voted unanimously in favor of the motion to accept the Executive Director's Report as presented.

**Ms. Reddick-Collins motioned, Mr. McClellan seconded, and the Board voted to enter into Executive Session in accordance with O.C.G.A. §§ 43-1-2 (k); 43-1-19 (h) and 50-14-2 (1) to deliberate on Applications, to receive the Attorney General's, Enforcement, and Cognizant Reports, and to conduct Applicant Interviews. Voting in favor of the motion were those present who included Board Members: Rachele Branson, Robert McClellan, Pamela Reddick-Collins, Casey Vance, and Marla Marlowe.**

**At the conclusion of Executive Session on Friday, August 20, 2021, Ms. Branson declared the meeting to be "open" pursuant to the Open and Public Meeting Act O.C.G.A. § 50-14-1 et seq. No votes were obtained during Executive Session.**

## **OPEN SESSION**

### **Executive Session Minutes**

- 1. May 14, 2021 Executive Session Zoom Meeting Minutes**
- 2. June 17, 2021 Executive Session Investigative Committee Zoom Meeting Minutes**

Ms. Branson motioned, Ms. Reddick-Collins seconded and the Board voted unanimously in favor of the motion to accept the May 14, 2021 Executive Session Zoom Meeting minutes and the June 17, 2021 Executive Session Investigative Committee Zoom Meeting Minutes as presented.

### **Attorney General's Report – M. Brannen**

Ms. Branson motioned, Mr. McClellan seconded and the Board voted unanimously in favor of the motion to accept the Attorney General's Report as presented.

**Complaint Summary Report – R. Branson**

Mr. McClellan motioned, Ms. Reddick-Collins seconded and the Board voted unanimously in favor of the motion to accept the following recommendations made in Executive Session:

- OT180025** Request records from Respondent as discussed in Executive Session. If not received in 30 days, refer to Attorney General’s Office for or a hearing for Indefinite Suspension with terms and conditions as discussed to include a fine of \$500 per violation of previous Public Consent Order. If received in 30 days, schedule meeting of the Board for review.
- OT200023** Close the case and renew the license with a Letter of Concern regarding alcohol.
- OT210008** Close the case.
- OT210014** Close the case.

Casey Vance left the meeting at 11:20 a.m., a quorum of the Board still present.

- OT220004** Close the case with a Letter of Concern regarding criminal history.
- OT200016** Request records from Respondent as discussed in Executive Session. If not received in 30 days, refer to Attorney General’s Office for or a hearing for Indefinite Suspension with terms and conditions as discussed. If received, schedule a meeting of the Board for review.
- OT200017** Close the case with a Letter of Concern regarding accurate and timely update of address and email address with the Board.

**Miscellaneous Executive Discussion – Applicant 2895488**

Ms. Branson motioned, Mr. McClellan seconded and the Board voted unanimously in favor of the motion to reinstate the license with a Letter of Concern regarding timely renewal of licensure.

**Applications for Board Review**

Mr. McClellan motioned, Ms. Reddick-Collins seconded and the Board voted unanimously in favor of the motion to accept the following recommendation made in Executive Session:

- Applicant 2953722** Require completion of a 320-hour supervised clinical traineeship with a 90-day limited permit.
- Applicant 2937682** Require completion of a 320-hour supervised clinical traineeship with a 90-day limited permit.
- Applicant 2954555** Require completion of a 320-hour supervised clinical traineeship with a 90-day limited permit. If licensed, flag for CE audit.
- Applicant 2926487** Require completion of a 320-hour supervised clinical traineeship with a 90-day limited permit.
- Applicant 2897650** Must submit two (2) hours ethics and 11 hours live CE. If completed, reinstate license.

**Adjournment** No further business was discussed and the meeting adjourned at 12:32 p.m.

**Minutes recorded by:** Michelle Hornaday, Board Support Specialist  
**Minutes reviewed and edited by:** Charlotte Mason, Licensing Supervisor & Adrienne Price, Executive Director  
**Minutes approved on:** September 20, 2021



RACHELE BRANSON  
**BOARD CHAIR**

ADRIENNE PRICE  
**EXECUTIVE DIRECTOR**