

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF STATE
BUREAU OF PROFESSIONAL AND OCCUPATIONAL AFFAIRS

F I N A L M I N U T E S

MEETING OF:

**STATE BOARD OF OCCUPATIONAL THERAPY
EDUCATION AND LICENSURE**

TIME: 10:30 A.M.

Held at

PENNSYLVANIA DEPARTMENT OF STATE

2525 North 7th Street

CoPA HUB, Eaton Conference Room

Harrisburg, Pennsylvania 17110

as well as

VIA MICROSOFT TEAMS

February 26, 2026

State Board of Occupational Therapy
Education and Licensure
February 26, 2026

BOARD MEMBERS:

Kerri L. Hample, OTD, OTR/L, Chairperson - Absent
Arion R. Claggett, Acting Commissioner, Bureau of
Professional and Occupational Affairs
Joanne M. Baird, Ph.D., OTR/L
Lisa Livingston, MS, OTR/L, SCDCM, Secretary - Absent
Jena Shovlin, OTR/L, Vice Chairperson
Wendy E. Walsh, Ph.D., OTR/L
Daniel Kline, Public Member - Absent

BUREAU PERSONNEL:

Sean C. Barrett, Esquire, Board Counsel
William Newport, Esquire, Senior Board Prosecutor
Liliana Fisher, Esquire, Board Prosecutor
Adrienne McClendon, Esquire, Board Prosecutor Liaison
Ronald Rouse, Esquire, PA Office of General Counsel
Karl Geschwindt, Esquire, Senior Board Prosecutor
Paul Keller, Board Administrator
Deena Parmelee, Legal Office Administrator,
Department of State
Shana Walter, Esquire, Deputy Chief Counsel
Emyline Breckenridge, Esquire
Stephanie Dunkerley, Legal Analyst, Office of
General Counsel

ALSO PRESENT:

Amy A.
Kristen Neville, American Occupational Therapy
Association
Melanie Brock, Occupational Therapy Assistant
Gillian O'Rourke, Slippery Rock University
Francielle Pineda, OTR, NBCOT
Jeanne Coviello, OTD, OTR/L,
Jacob Hill, Sargent's Court Reporting Service, Inc.

State Board of Occupational Therapy

Education and Licensure

February 26, 2026

[Pursuant to Section 708(a)(5) of the Sunshine Act, at 10:00 a.m. the Board entered into executive session with Sean C. Barrett, Esquire, Board Counsel, for the purpose of conducting quasi-judicial deliberations on a number of matters currently pending before the Board and to receive the advice of counsel. The Board returned to open session at 10:30 a.m.]

The regularly scheduled meeting of the State Board of Occupational Therapy Education and Licensure was held on Thursday, February 26, 2026. Jena Shovlin, OTR/L, Vice Chair, officially called the meeting to order at 10:31 a.m.

[Sean C. Barrett, Esquire, Board Counsel, informed everyone that the meeting was being recorded, and those who continued to participate were giving their consent to be recorded.]

1 [Paul Keller, Board Administrator, began the meeting
2 with an introduction of Board members and attendees.
3 A quorum of Board members was present.]

4 ***

5 Approval of Minutes - December 5, 2025

6 VICE CHAIR SHOVLIN:

7 I'd like to move to approve the board
8 minutes from December 5, 2025.

9 ACTING COMMISSIONER CLAGGETT:

10 So moved.

11 MS. WALSH:

12 I second that.

13

14 Claggett, aye; Baird, aye; Shovlin,
15 abstain; Walsh, aye.

16 [The motion carried. Vice Chair Shovlin abstained
17 from voting on the matter.]

18 ***

19 Appointment - Shana Walker, Esquire, Deputy Chief
20 Counsel, Prosecution Division

21 [Shana Walker, Esquire, Deputy Chief Counsel,
22 Prosecution Division, reported on the duties and
23 tasks of the Prosecution Division. She explained the
24 Bureau of Professional Occupational Affairs provides
25 administrative and legal support to 29 professional

1 and occupational licensing boards and commissions to
2 protect the health and safety of the public, as well
3 as the integrity of the professions. The Prosecution
4 Division works with investigative and compliance arms
5 to receive complaints, investigate allegations and
6 enforce compliance for same. The division is quite
7 large, close to 40 attorneys. The prosecution
8 process, in a nutshell, starts with a complaint.

9 Ms. Walter explained that when a complaint is
10 received an initial determination is first made to
11 determine whether or not the board has jurisdiction
12 over the matter. If jurisdiction is established and
13 the respondent is charged, the individual can elect
14 to go through the hearing process. The respondent
15 also has the option of electing to go through a
16 consent agreement process, frequently presented by
17 the prosecutors at the board meetings. From that
18 point, the complaint is sent to Bureau of Enforcement
19 and Investigations (BEI).

20 Ms. Walter commented BEI is an entity that
21 conducts interviews, inspections, and obtains
22 evidence. After the BEI investigation of the
23 complaint, the prosecuting attorney reviews the BEI
24 findings. He or she will determine what steps should
25 be taken next. The BEI does not have unlimited

1 access to locations or documents. They sometimes
2 have the ability to inspect facilities and obtain
3 documents.

4 Ms. Walter continued by stating, after the BEI
5 investigation is complete, the prosecuting attorney
6 will review the evidence collected to decide whether
7 or not a credible violation has occurred. In
8 instances in which the evidence supports a violation
9 having occurred, there are several charging documents
10 that the prosecution has at its disposal to utilize
11 in addressing the violation. Some of the options
12 include but are not limited to, an immediate,
13 temporary suspension, an order to show cause, an
14 automatic suspension order for mental and physical
15 examination.

16 Ms. Walters stated, if the Board determines that
17 discipline is appropriate for the violation, they
18 have choices to remedy it, such as revocation,
19 suspension, or probation. Everything the prosecution
20 does is confidential and pursuant to statute.

21 Ms. Walter advised that all of their records
22 relating to investigations, memos, and transcripts
23 are confidential. The information can be shared with
24 other licensing boards and law enforcement. Only the
25 final action in a matter can be shared publicly.

1 She informed members that 46 cases were opened
2 for the Board in 2025. She added 33 cases were
3 closed, and the average time for closing cases was
4 315 days from the date they were opened. Monetary
5 penalties were imposed in one case, two licenses were
6 suspended, and 12 warning letters were sent out.

7 Ms. Walter advised the Board, at the time the
8 report was generated, there were 14,384 active
9 licenses for the Board and 39 open cases.]

10 ***

11 Report of Board Counsel - Proposed Adjudication in
12 Order

13 [Sean Barrett, Esquire, Board Counsel, presented on
14 Agenda Item No. 3, Case no. 25-67-008688.]

15 MR. BARRETT:

16 Item No. 3, based on Executive Session
17 deliberations, I believe the Board
18 would entertain a motion to direct to
19 have counsel draft an Adjudication and
20 Order consistent with Executive
21 Sessions discussions for Amy Alcantara,
22 Case No. 25-67-008688.

23 ACTING COMMISSIONER CLAGGETT:

24 So moved.

25 MS. WALSH:

1 Second.

2

3 Claggett, aye; Baird, aye; Shovlin,
4 aye; Walsh, aye.

5 [The motion carried unanimously.]

6

7 [Liliana Fisher, Esquire, Board Prosecution,
8 presented on Agenda Item No. 4, Case No. 23-67-
9 017895.]

10

11 [William Newport, Esquire, Board Prosecutor,
12 presented on Agenda Item No. 5, Case No. 25-67-
13 018866.]

14

15 MR. BARRETT:

16 Based on the presentation of prosecution
17 would any member of the board wish to
18 return to executive session for further
19 deliberations?

20

21 Hearing none, Based on the
22 presentation of prosecution and Executive
23 Session Deliberations, I believe the
24 board would entertain a motion to adopt
25 the Consent Agreements at Item No. 4,
Case No. 23-67-017895, and Item No. 5,

1 Case No. 25-67-018866.

2 ACTING COMMISSIONER CLAGGETT:

3 So moved.

4 MS. WALSH:

5 Second.

6

7 Claggett, aye; Baird, aye; Shovlin,
8 aye; Walsh, aye.

9 [The motion carried unanimously. The Respondent's
10 name for Case No. 23-67-017895 is Randolph Scott
11 Wolfe, OTR, L.]

12 ***

13 Report of Board Chairperson - No Report

14 ***

15 Report of Acting Commissioner - No Report

16 ***

17 Report of Board Administrator

18 [Paul Keller, Board Administrator, announced that
19 board member training was taking place again this
20 year on May 5th, 2026, and at the same location as
21 last year.

22 Professional members have the option of
23 attending, but public members must attend. Mr.
24 Keller will notify Mr. Kline, a public member, with
25 the information. Mr. Keller also asked for a

1 response for the email he sent out as notification of
2 same.]

3 ***

4 Miscellaneous - American Occupational Therapy
5 Association Annual Conference

6 [Acting Commissioner Claggett requested that Board
7 Counsel, Sean Barrett, frame a motion to vote for
8 attendance at the conference.]

9 MR. BARRETT:

10 Based on discussion, I believe the Board
11 would entertain a motion to approve three
12 members to attend the American
13 Occupational Therapy Association Annual
14 Conference from April 23rd to April 25th,
15 2026, in Anaheim, California.

16 ACTING COMMISSIONER CLAGGETT:

17 So moved.

18 MS. WALSH:

19 Second.

20
21 Claggett, aye; Baird, aye; Shovlin,
22 aye; Walsh, aye.

23 [The motion carried unanimously. Decisions on
24 specific attendees for the conference to be
25 determined.]

Miscellaneous - 2027 Board Meeting Dates

[Mr. Keller informed the Board that meeting dates for 2027 were up for vote.]

MR. BARRETT:

Based on discussion here today, I believe the Board would entertain a motion to approve the proposed meeting dates for the Board of Occupational Therapy for 2027 as outlined.

ACTING COMMISSIONER CLAGGETT:

So moved.

MS. WALSH:

Second.

Claggett, aye; Baird, aye; Shovlin, aye; Walsh, aye.

[The motion carried unanimously.]

Miscellaneous

[Agenda Ns. 8, Sunshine Act, and Agenda No. 9, Election of Officers, were tabled for a future board meeting.]

Miscellaneous - Occupational Therapy Compact Update

1 [Sean Barrett, Board Counsel, reported to the Board
2 that the licensure Compact is now up for a vote for
3 consideration in the State House and Senate. The
4 bill has to undergo three considerations before
5 getting a final vote. It then needs to be signed by
6 the Governor. Mr. Barrett will continue to give the
7 Board updates.

8 Mr. Barrett continued by stating, if the bill
9 gets passed, there would be a provision for temporary
10 regulations if the Board wished to discuss at that
11 time. He advised that temporary regulations are used
12 to establish a fee that the board might need to
13 impose in the short term. Until there is a final
14 bill, he did not wish to anticipate what might be
15 discussed in the future regarding the Compact.]

16 ***

17 Miscellaneous - NBCOT Presentation

18 [Francielle Pineda, OTR, Assistant Director of
19 External and Regulatory Affairs at National Board for
20 Certification in Occupational Therapy (NBCOT),
21 presented to the Board information regarding their
22 services, resources, and policies.

23 Ms. Pineda stated their mission was to protect
24 the public through the validation of essential
25 competencies for effective and safe occupational

1 therapy practice. She suggested this mission
2 underscores everything they practice, such as guiding
3 their Board of Directors and determining the
4 requirements for their exams and certification
5 renewal.

6 Ms. Pineda continued by informing the Board that
7 NBCOT was held accountable by an outside accrediting
8 agency known as the National Commission for
9 Certifying Agencies (NCCA). She described the
10 composition of the NBCOT Board of Directors as
11 including 15 OTRs and Certified Occupational Therapy
12 Assistant (COTA), professionals with three public
13 members as well. She also advised the Board that she
14 wanted to present on three topics that day: Work
15 with students, certificates and regulators.

16 She stated the PA State Board of Occupational
17 Therapy was one of their largest constituents for the
18 use of their exam for initial licensure. All 50
19 states, Guam, D.C. and Puerto Rico require NBCOT
20 certification in order to get a license to practice.
21 There is a study exam for both OTRs and COTAs held
22 once every five years. Surveys are sent out to
23 practitioners all over the country that have a
24 minimum of three years' experience. Ms. Pineda
25 suggested this helps to ensure that the exams reflect

1 the current practice. The blueprints for the exams
2 must be written to the exam Content Outline, a free
3 resource that anyone can access on their website.

4 She suggested the Exam Scoring Calendar would be
5 a useful resource for the board to use. This tool is
6 used to help students or candidates use to figure out
7 the timing of their exam. Starting in 2026, the
8 NBCOT moved to a weekly scoring schedule. Ms. Pineda
9 explained, for example, if a student was aiming to
10 get their score on Thursday, April 9th, 2026, they
11 would need to take the exam by or on Monday, April
12 6th, 2026. If they were to take the exam on April
13 7th or 8th, 2026, they would not receive their score
14 until the next scoring day, the following Thursday.

15 Ms. Pineda shared some national data with the
16 board. She commented, in 2025, the NBCOT had 23,139
17 score transfers. These score transfers provide proof
18 that an individual has passed the NBCOT OTR or COTA
19 exam. The eligibility confirmation notices in 2025
20 numbered 10,228. She stated the reason the numbers
21 were lower in the second round was because not all
22 states allow for temporary licenses or limited
23 permits.

24 However, part of obtaining certification with
25 NBCOT, the applicants have access to an online tool

1 called Navigator, a digital learning platform that is
2 available day or night and free of charge. There are
3 over 200 evidence-based tools on this platform.
4 Examples include case simulations, Orthotic Builder,
5 mini-practice quizzes, OT knowledge library and PAMs,
6 or Physical Agent Modalities. Another resource on
7 Navigator is Micro Credentials. Ms. Pineda described
8 this tool as containing tests that consist of 50 to
9 75 multiple choice questions, and there are micro
10 credentials available in different practice areas.
11 She advised 48 states, plus the District of Columbia,
12 accept Navigator. She stated there was a joint
13 partnership in public protection here similar to PA
14 state laws, the statutes, and the regulations. NBCOT
15 had comparable procedures they must adhere to.

16 She noted there are 9,939 total OTR professionals
17 in Pennsylvania with an average certified at 15
18 years' experience. There were a total of 3,441 total
19 COTA professionals in Pennsylvania with the average
20 year certified at 16 years.

21 Board members can actually compare over the years
22 certain trends maybe in workforce issues or trends to
23 be monitored. Navigator also has what is called an
24 administrator's portal. This is available to every
25 single primary board administrator across the

1 country. They are all granted access to the
2 Navigator administrator portal and are able to grant
3 additional access to colleagues. Ms. Pineda
4 emphasized that Navigator was meant to be a one-stop-
5 shop. She added that official SCORE transfers on
6 Navigator provided proof that individuals passed the
7 NBCOT exam, accessed through NBCOT, but via Visa
8 Credential Verification Certificate. If a member of
9 the Board was interested in reporting or in seeing
10 reports from disciplinary actions that NBCOT had
11 taken in other states, they could look up the
12 individual's certificate in the OT Action Exchange.
13 Verification of certification is a feature they can
14 access when looking up a certificate to see what
15 credentials the certificate lists, what the
16 individual's current status is or if their
17 certification has expired.

18 NBCOT has conducted studies on licensure,
19 processing times, dry needling, pelvic health,
20 licensure fees, continuing education, NBCOT exam
21 attempts, retakes, and many other topics the Board
22 may find helpful. They were able to obtain these
23 reports by reaching out through surveys or directly
24 contacting primary board administrators across the
25 country. She stated the resources were there to

1 assist the Board with making informed decisions.

2 Ms. Pineda addressed an executive summary sheet
3 to summarize key findings from studies. The NBCOT
4 Navigator has an infographic that walks an individual
5 through the exam development process, national
6 standards for occupational therapy, and why
7 certification matters. The NBCOT is also an
8 organizational member of the Institute of
9 Credentialing Excellence.

10 Ms. Pineda noted the OT Compact is a joint
11 initiative that has been worked on since 2019. There
12 is additional information on their website, and all
13 of their meetings are public for anyone wanting to
14 attend.

15 She asked the Board to save the date of their
16 2026 OT State Regulatory Leader Forum, on September
17 22nd and September 23rd, 2026. She outlined sessions
18 for learning about current and emerging issues and
19 trends and occupational regulation, certification,
20 and licensure. She also mentioned that Jodi
21 Schreiber was the ambassador for Pennsylvania and
22 available for anyone needing to contact her.

23 The discipline process was the focus of Ms.
24 Pineda's next part of the information for the Board.
25 She commented there were different processes involved

1 upon receipt of a complaint or an investigation
2 launched. She showed the Board members a visual
3 graph of the process to demonstrate how it could be
4 used for the educational purposes. She reiterated
5 the Board had been informed by the NBCOT of
6 disciplinary actions. Character View questions on
7 applicant exams and renewal applications are an
8 option that candidates can go through to determine if
9 they are eligible to sit for an exam. The most
10 frequent type of illegal behavior are felony and
11 misdemeanor convictions as of last year. The
12 severity of sanctions increases for OTs that are
13 practicing as opposed to those that are just applying
14 to sit for the exam. Revocation of a license is a
15 more stringent outcome at NBCOT than in other states.

16 Mr. Barrett inquired about whom to contact at
17 NBCOT, given that the Board had legislation pending
18 to potentially join the OT Compact. Ms. Pineda
19 suggested that Barbara Williams was the contact
20 person for the OT Compact at NBCOT. Ms. Williams
21 works with individuals at the OT Compact Commission.]

22 ***

23 Public Comment - None

24 ***

25 Adjournment

1 ACTING COMMISSIONER CLAGGETT:

2 Is there a motion for adjournment of
3 this Board meeting?

4 VICE CHAIR SHOVLIN:

5 So moved.

6 MS. WALSH:

7 I second the motion.

8 ***

9 [There being no further business, the Pennsylvania
10 State Board of Occupational Therapy Education and
11 Licensure adjourned at 11:26 a.m.]

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CERTIFICATE

I hereby certify that the foregoing summary minutes of the State Board of Occupational Therapy Licensure and Education Meeting, was reduced to writing by me or under my supervision, and that the minutes accurately summarize the substance of the State Board of Occupational Therapy Licensure and Education Meeting.

A handwritten signature in blue ink that reads "Jacob Hill". The signature is written in a cursive style and is positioned above a horizontal line.

Jacob Hill,
Minute Clerk
Sargent's Court Reporting
Service, Inc.

STATE BOARD OF OCCUPATIONAL THERAPY
EDUCATION AND LICENSURE
REFERENCE INDEX

February 26, 2026

TIME

AGENDA

10:00	Executive Session
10:30	Open Session
10:31	Official Call to Order
10:32	Introduction of Board Members/Attendees
10:34	Approval of Minutes
10:35	Appointment - Shana Walter, Esquire
10:41	Report of Board Commission/Counsel
10:42	Report of Prosecutorial Division
10:46	Report of Board Administrator
10:47	Miscellaneous / Discussion
10:53	Appointment - NBCOT
11:26	Adjournment