

Attachment 1



**North Carolina Board of Physical Therapy Examiners
June 8, 2022
AIHF Conference Room
8300 HEALTH PARK
Raleigh, North Carolina 27615**

Members Present:

Teresa F. Hale, PT, Chair
C. David Edwards, PT, Secretary/Treasurer
Paul Garcia, MD
Leslie P. Kesler, PT
Jamie L. Miner, PT
Rosa Maria Gonzalez, BSN, RN, Public Member
Megan Wentz, PTA
Stephanie Bernard, PTA – Arrived (9:00 am)

Staff Present:

Kathy Arney, PT, Executive Director (ED)
Debbie Ragan, PT, Deputy Director (DD)
Paula Brooks, Office Administrator / Recorder
David Nall, IT Systems Administrator
Joyce Tynes, Finance Manager

David C. Gadd, Board Attorney

The format for the Minutes is as follows: *V-# Summary of Motion (Board Member who introduced motion)*

Meeting Called to Order by T. Hale, NCBPTE Board Chair 8:37 a.m.

The meeting was conducted in-person and open to the public. The meeting was also streamed live via YouTube. The meeting was noticed in the Board office, on its website, and NC Secretary of State website as required by law. There were no requests for the meeting agenda prior to the meeting. The Chair conducted a roll call; all members were present as noted above.

Conflict of Interest Reminder by the Chair

T. Hale, Chair, reminded members of their duty to avoid conflicts of interest and appearances of conflicts of interest. In addition, T. Hale asked if there were any known conflicts of interest or appearance of conflicts of interest with respect to any matters that were to be brought before the Board today as required by Executive Order 127. No Board member indicated conflicts of interest with the business before the Board today.

Approval of the Minutes

V-065-'22 Passed Minutes March 9, 2022 [Attachment I]

Motion to approve draft **Minutes of the** Board Meeting held on March 9, 2022. (*Edwards*)

Members voting in the affirmative:	Hale, Edwards, Garcia, Gonzalez, Kesler, Miner, Wentz
Members voting in the negative:	None

V-066-'22 Passed Minutes April 28, 2022 [Attachment II]

Motion to approve draft Minutes of the Special Board Meeting held on April 28, 2022. (*Edwards*)

Members voting in the affirmative:	Hale, Edwards, Garcia, Gonzalez, Kesler, Miner, Wentz
Members voting in the negative:	None

Closed Session

V-067-'22 Passed - Closed Session

Motion to go into Closed Session was made at 8:58 am in accordance with GS 143-318.11 (a) (1) and (6) to engage in privileged communications with the Board's counsel concerning Closed Session Minutes of Board Meetings and personnel matters. (*Edwards*)

Members voting in the affirmative:	Hale, Edwards, Garcia, Gonzalez, Kesler, Miner, Wentz
Members voting in the negative:	None

V-068-'22 Passed - Return to "Open Session"

Motion to return to Open Session at approximately 9:35 a.m. (*Edwards*)

Members voting in the affirmative:	Hale, Edwards, Garcia, Kesler, Miner, Gonzalez, Wentz, Bernard
Members voting in the negative:	None

Motions in Open Session discussed during Closed Session

V-069-'22 Passed – Motion to approve actions from the Closed Session

Motion was made to approve:

- **Hiring Summer Intern for Record Retention projects and status change of Finance Manager to full-time and responsibilities including Licensing Manager**
- **ED Compensation review – 8% Bonus**
- **Adoption of the Closed Session Minutes from March 9, 2022 as written (*Kesler*)**

Members voting in the affirmative:	Hale, Edwards, Garcia, Kesler, Miner, Gonzalez, Wentz, Bernard
Members voting in the negative:	None

Responses from ED/DD to questions addressed at the previous Board Meeting

The ED informed the Board of Board responses sent to scope of practice questions from the prior meeting including:

- Advanced Training Position Statement -Updated and was posted on Board website.
- Student Performance of internal Pelvic Health-response sent to all questions asker’s of Q1-2022
- Binding and Gaffing – response sent to inquiry
- Pessary Fittings – response sent to inquiry
- Perineural Dry Needling – response sent inquiry

Scope of Practice Questions for Board Consideration/Public Protection Task Force (PPTF) [Attachments III, IV]

-

The Board reviewed the following topics related to scope of practice from the May 26, 2022 PPTF meeting. Chair Edwards of the PPTF provided an update from the Committee Internal Pelvic Health – After thorough consideration and research from schools and subject matter experts, the Internal Pelvic Health position statement includes PTAs, PT/PTA students with appropriate supervision by a qualified PT practitioner. Position statement 13 was merged into this position statement to include fitting pessaries by an appropriately trained PTs

V-070– ‘022 Passed Motion to accept the new Position Statement on Pelvic Health and updated Definition of Advanced Training. (Edwards)

Members voting in the affirmative:	Hale, Edwards, Garcia, Kesler, Miner, Gonzalez, Wentz, Bernard
Members voting in the negative:	None

Virtual PT Platform – UHC Kaia app for virtual physical therapy –Arney received 3 emailed complaints regarding the announcement of this virtual physical therapy app. It appears that no licensee is involved in patient care with this app creating a potential advertising issue. Both APTA and FSBPT issued statements regarding this specific app. The Investigative Committee of the Board has reviewed the complaints and an investigation is underway. The Investigative Committee will report progress as they are able.

NC PT Practice Act definition of “mental health” question – the Board reviewed a question posed by an applicant regarding the physical therapy definition of mental health. The ED proposed a response that included the information from Board rules related to the wording in the practice health of “mental disability” and context of permitted PT practice. Board members recommended additional

information about the Board’s inability to answer payer policy questions and specifics related to what areas of practice may be relevant to mental disabilities. Arney was tasked with responding to the applicant.

Imaging update was discussed during the Attorney report.

Attorney’s Report

- **General Attorney Update**
- Attorney Gadd reported the MOU was executed with NC Professionals Health Program and a licensee has been referred; additional benefits are referral resources for licensee who contact them for fitness to practice evaluations, substance use disorders and mental health issues.
- The AIHF building is being sold to Thomas Park Assoc., with sale being finalized sometime in June. The Board Chair will sign the Estoppel agreement that is part of our lease; additional changes are not anticipated at this time.
- **Legislative Update**
- Attorney Gadd reviewed bills introduced to the NC General Assembly during the short session. At this time, it does not appear that bills introduced will have significant impact to the Board and Board operations. Proposed changes to NC GS 93B surrounding military applications that include military veterans and veteran spouses were already implemented by Board staff and are included in reporting where military applications/licensee statistics are reported. Gadd will continue to monitor legislative activity.
- **Disciplinary Actions for Board review**
- **PT Lic. #P19816** – David Steinbach, joined the Board for an informal meeting at 1:00 p.m. Prior to the licensee meeting with the Board, Attorney Gadd reviewed facts of the case that led to the Investigative Committee proposing a new Consent Order, which included a violation of a consent order not to dry needle patients without supervision and completing Board required training. The licensee presented information regarding his training, initial patient incident and second incident leading to violation of his consent order, letters of support and character references for the Board’s review and consideration. The licensee asked for a change in the proposed new consent order and suggested alternatives. The Board then asked questions to which the licensee responded. The licensee was advised that this was an informal meeting and depending on the Boards’ decision, he has the option to request a contested case hearing. He was then asked to step out while the Board deliberated, the voted to accept the recommendation of the Investigative Committee of 12 months active suspension, 18 months inactive probation with conditions and paying costs of the investigation. Attorney Gadd will draft the final consent order and sent to the licensee for consideration.

V-071 – ‘22 Passed - Motion to accept the recommendation of the Investigative Committee for a Consent Order including probation with both active and inactive suspensions and conditions and payment of the costs of investigation for PT Lic. #P19816. (Hale)

Members voting in the affirmative: Hale, Edwards, Garcia, Kesler,
Wentz, Bernard
Members abstaining: Gonzalez
Members recusing: Miner
Members voting in the negative: None

- **PT Lic.#P13380** – Christopher Emmerich – The Investigative Committee proposed a Consent Order for the licensee based on a complaint regarding an incident of substance impairment at work with potential patient harm. Details of the case were reviewed with the Board regarding the case and recommendations were discussed including a period of active and inactive suspension of 24-months and additional conditions.

V-072 – ‘22 Passed - Motion to accept the recommendation of the Investigative Committee for probation both active and inactive suspension, conditions and payment of costs of the investigation for Lic.#P13380. (Kesler)

Members voting in the affirmative: Hale, Edwards, Garcia, Kesler,
Gonzalez, Wentz, Bernard
Members recusing: Miner
Members voting in the negative: None

Board Regulatory Education

- **Mask Mandates** – Guidance to follow the Governors recommendations and reviewed regulations for State and Federal mandates. The Board does not have powers to enforce these mandates. NCBPTE makes recommendations to PTs and PT that the Board supports the Governors recommendation and as licensees they have a duty provide safe services for patients.
- **Discrimination against foreign trained applications** – email C. Rodgers
- **Imaging Update** – David Gadd, updated the Board that the Board staff was asked to provide recommendations for Imaging for a bill that a general assembly member would like to introduce regarding imaging ordering for physical therapists. Board Attorney, ED and DD collaborated on recommendations made. This was not introduced in the short session. We will wait until the long session before making a determination on next steps and researching whether there is sufficient statutory authority to create rules related to PTs ordering imaging.

Executive Director’s (ED) Update
[Attachments V - VII]

The Executive Director provided verbal updates including the following:

- AIHF 8300 Health Park ▪ Building Sale
- The Estoppel document will be signed by the Board Chair and returned to Mason Williams properties by June 15, 2022 as requested
- Potential Sublease – a tenant in the building was referred to Arney to discuss their need for a potential sublease. Issues surrounding a sublease and security concerns were referenced. At this time the majority of the Board was not in favor of granting a sublease.
- Long-term space considerations – The current lease expires August 31, 2028. The ED recommends continuing working toward a “paperless office” thus future space needs and decisions may not be dependent on a location for completing Board work but other considerations at this time.

- Current Licensees Count – Quarterly update
 - steady on average 3% growth;
 - growth in compact privileges issued from a year ago is 100%; ▪ military permit issuance has slowed.
- Temporary Exemptions for Licensure – The Board office is getting fewer requests for temporary exemptions from PT/PTA licensure in NC due to the current state of emergency in NC. They are aware this exemption will end immediately when the state of emergency is lifted in NC.
 - Temporary exemption requests have slowed to approx. 1-2 per week
 - Once the state of emergency ends all temporary exemption holders will be notified.

- **Strategic Planning for FY 2023**

V-073 – ‘22 Strategic Planning Task Force – Proposed Strategic Plan FY 2023

Motion made to adopt the strategic plan presented by the ED with minor edits. (*Edwards*)

Members voting in the affirmative: Hale, Garcia, Edwards, Kesler
Miner, Gonzalez, Wentz, Bernard

Members voting in the negative: None

- **NC Professional Health Program** – signed MOU is attached for future reference
- **Retirement Plan Trustee** – New Bylaws have been developed and the Retirement plan was recently reviewed and has been readopted as required periodically it is attached for future reference including newly adopted Bylaws, Plan documents both detailed and summarized for plan participants.

- **Board History** updated 2022 – the ED requested Board member input on the Annual Board History updates. Feedback included the document was very well done but shortening narratives in favor of bulleted lists may be easier to read and digest. Arney will complete the Board History.

Financial Update [Attachments VIII – XIII]

Update was provided by Joyce Tynes, NCBPTE Finance Manager:

Documents reviewed included

- Financials – Profit and Loss – April 30, 2022 comparison to same period 2021
- Financials – Balance Sheet – April 30, 2022 to same period 2021
- Balance Sheet
- Estimated Final Totals for FY 2022 based on March 31, 2022
- Finance and Audit Committee Recommendations for FY 2023
 - Proposed budget FY 2023 (one-time renewal fee reduction \$20)
 - Use of Reserve
 - Finance Policies – new and updated
 - Taxable – Board / staff amenities
 - Investment of monies into Annuity account at PNC Bank

V-074 – ‘22 Motion to adopt all financial new and updated policies as presented by the Financial Manager. *(Kesler)*

Members voting in the affirmative:	Hale, Edwards, Garcia, Kesler Miner, Gonzalez, Wentz, Bernard
Members voting in the negative:	None

V-075 – ‘22 Motion to move \$150,000 to PNC Fixed Annuity Investment for a rate of 3.2% for 3 years. *(Edwards)*

Members voting in the affirmative:	Hale, Edwards, Garcia, Kesler Miner, Gonzalez, Wentz, Bernard
Members voting in the negative:	None

V-076 – ‘22 Motion to adopt the proposed budget for FY2023 as presented with an update to ED compensation approved during the closed session. *(Kelsner)*

Members voting in the affirmative:	Hale, Edwards, Garcia, Kesler, Miner, , Wentz, Bernard
Members voting in the negative:	None

The Board discussed a recommendation of the Finance Manager and Executive Director (ED) to restructure the Designated Reserves. After discussion the Board provided feedback to make some changes. The recommendations for adjustments to the Designated Reserves will be brought back for review to the September 2022 Board meeting for consideration.

Report from Deputy Director [Attachments XIV - XV]

- Deputy Director Report

V-077– ‘022 Biennial Review of Position Statements

Motion to adopt the:

- **Revised “Performance of Finger Blood Specimens” position statement #6 which now includes position statement #12 on suture/staple removal and other non-physical Therapy Medical procedures (Renamed to: Performance of Non-Physical Therapy Medical Procedures Requested by Physicians in Various Healthcare Settings (Formerly: Performance of Finger Blood Specimens), and**
- **Revised Soft tissue mobilization using biofeedback, electrical stimulation and internal pelvic floor muscle techniques vaginally or rectally by a PTA - which now addresses Internal Pelvic Health Scope of PT Practice broadly**
- **All other position statements readopted as written (*Kesler*)**

Members voting in the affirmative: Hale, Garcia, Edwards, Kesler
Miner, Gonzalez, Wentz, Bernard

Members voting in the negative: None

- Regulatory Flexibility – review and discussion: end of the State of Emergency; the Board staff is prepared to execute any necessary changes when the State of Emergency ends.
- The listing of PT/PTA temporary exemptions from licensure was cross-referenced with the active endorsement application listing in the Board database. Any temporary exemption holders with an active application for NC PT/PTA licenses were contacted to facilitate completion of the existing endorsement application, as this needs to occur before the state of emergency is lifted in NC.
- TOEFL – iBT and Essentials – The TOEFL iBT is a 100% academic English test as compared to the Essentials test which is 50% academic English and 50% general English. The FCCPT does not accept the Essentials TOEFL test. After additional research and discussion with the ED and Board attorney, the Board staff will continue to only accept the TOEFL iBT (either Prometric and/or Home Edition) A statement to this effect has been posted on the website.
- Update on Transcripts – Board staff continue to be satisfied with utilization of third-party transcript services, namely Parchment / Student Clearinghouse. More and more educational institutions are utilizing their services as well, though the Board will still accept mailed transcripts from the primary source.
- Licensing Team Application Questions- The Board staff continues to rely on Board Rules and the NC PT Practice Act as the basis for responding to application questions in a fair and consistent manner. Work History will be removed from the application as it is not being used consistently to evaluate educational background or ethical character.

V-078 - '022 Passed – Motion was made to remove the work history requirement from all initial and revival applications (*Miner*)

Members voting in the affirmative: Hale, Garcia, Edwards, Kesler
Miner, Gonzalez, Wentz, Bernard

Members voting in the negative: None

Work history is not used to make licensure decisions on competence or moral character when conducting application reviews

V-079-'022- Motion to approve the proposed revival changes to make all revivals consistent in the application portion of the requirements (*Kesler*)

- Revivals – by Payment, CC, Endorsement, 500 Hours, and Exam

The application portion of the revivals will be made more consistent with the addition of: JE requirement, two-character references, Attestation, Photo, approval by ED and DD

- The application will no longer require a notary, work history, or Board approval,
- Future revisions also approved include moving to online payment of revival application fees, and development of the online revival process

Committee on Board Rules [Attachment XVI]

The Board reviewed Rules for amendment, proposed permanent rules cited:

- 21 NCAC 48B .0102
- 21 NCAC 48F .0101
- 21 NCAC 48G .0105 • 21 NCAC 48G .0203
- 21 NCAC 48G. 0504

And repeal the following rules:

- 21 NCAC 48E .0104
- 21 NCAC 48F .0103

V-080 – '22 Passed – Motion to adopt the proposed Rules as written (*Kesler*)

Members voting in the affirmative: Hale, Garcia, Edwards, Kesler
Miner, Gonzalez, Wentz, Bernard

Members voting in the negative: None

- Timeline – Next steps:

- Rules submitted to RRC for review before June 20, 2022
- RRC reviews rules July 21, 2022 ○ Proposed rules effective date August 1, 2022
- Future Rules for consideration ○ Informed Consent - will be added to the next Rule cycle beginning around September 2022

Committee on Information Technology [Attachment XVII]

Written Updates were provided by the IT Department

IT Update – G. Seipp, Director Information Technology

- Conversion to Microsoft 365 has been completed
- The Board will be converting to Teams, which will replace Discord and Zoom

Correspondence with Schools and Annual School Score Reports [Attachment XVIII - XXI]

- Pass rate (2022) for NC PT and PTA Schools (as of May 16, 2022)
- Pass rate (2021) for NC PT and PTA Schools (as of May 16, 2022)
- Pass rate (2019) for NC PT and PTA schools (as of May 16, 2022)
- Pass rate (2018) for NC PT and PTA schools (as of May 16, 2022)

No recommendations were made for communications with schools regarding pass rates. The Board will continue to monitor quarterly.

Documents provided for review and reference:

- Updated School Addresses and contacts
- A link providing 2022 Exam Schedule and Board Member notification for score days
- School Presentations ○ Arney – High Point University – June 1st Arney – June 3rd – Ragan & Carter
- School Communications ○ Ongoing related to AAP and Transcripts – Licensing Staff

Prometric

- Satisfaction (results for January – March 2021) The Board continues to review and screen the satisfaction scores for NC, while taking into consideration that the survey is taken just after the student finishes taking the NPTE

Ethics Commission [Attachment XXII]

Reminders were issued to the Board members for the following:

- Board Member Ethics Education (required every 2 years)
- Ethics Compliance Report – Board members should refer to this report for their next scheduled training and SEI filing deadlines

- SEI Reminder – Due April 15 annually – ALL Board members – click for filing instructions – <https://ethics.nc.gov/seis>
- Lobbying News and Tips from NC SOS office – Dec 7 2021

PT Compact Commission

Arney provided updates to the PT Compact

- Compact Update-
 - Education about PTCC to licensees – Board thoughts and ideas
 -
 - Compact Compliance Reports – NCBPTE continues to remain compliant.

Annual PT Compact Commission Meeting – Orange County, CA October 30, 2022 – Arney will attend

Board Appointments 2022 (1PT and 1PTA) / 2023 Board Appointments

- o Eligible for Reappointment
 - Term Limited – Garcia
 - Possible reappointment – Miner & Gonzalez o APTA NC Nominations open until 6/10/22
 - Posting on APTA NC and NCBPTE website (link to APTA NC)

Submission of Reports to State etc.

- Aetna Insurance Report
- NCBPTE Board member SEI filing – complete
- Catapult – Annual Wage and Salary survey 2022- complete
- Ethics Liaisons filing quarterly expense reports to NC SOS – Arney / Ragan
- 1Q 2022 Disciplinary Action Report – B. Trais
- NC Bold – NC Dept of Commerce for period of 01/01/2021 thru 12/31/21
- US Dept of Commerce – Census of Government – Survey of Public Employment & Payroll-March 2022 State Agencies
- NC Dept of Revenue (DOR) 2022
- NCBPTE Submission of Collections Branch Management of Dept of Archives Board Minutes 2021
- NCQA / CVO request from Andros- primary source education verification
- NEIS Annual Audit – State Farm Insurance Policy
- Annual update of NC Master Dishonesty Policy – Great American ins. – Lis Hale Renewal Complete 03/01/22 to 03/01/2023
- GASB Standards for financial reporting – Forwarded to Auditor

Election of officers and FSBPT Delegates/Appointment of Standing Committee members

- Appointment by Chair to Public Protection Task Force – Hale, Board Chair, appointed Miner to the PPTF.

Federation (FSBPT)

- FSBPT Webinar – Educational News briefs
Attendance at FSBPT Annual Meeting Orange Co, CA October 27 / 29, 2022

V-081 – ‘022 Motion to fund 3 Board Members (in addition to FSBPT funded members and ED) to attend the Annual FSBPT meeting in Orange County, CA in October, 2022. *(Miner)*

Members voting in the affirmative:	Hale, Garcia, Edwards, Kesler Miner, Gonzalez, Wentz, Bernard
Members voting in the negative:	None

- Delegates – VIRTUAL Delegates Assembly 2022 – October 24, 2022
- FSBPT Virtual Administrator Training – August 19-21, 2022
- FSBP New Member Portal

APTA NC & APTA

- APTA NC
 - Annual Conference – October 14-15 2022 High Point, NC
 - Board member attendance at APTA NC – need volunteer to provide NCBPTE report if asked – Jamie Miner and Rosa Gonzalez will attend and report back to the Board.
 - Newsletters links : https://aptanc.org/page/aptanc_newsletters
- APTA – apta.org
 - APTA Advocacy Network Newsletter
 - APTA Notification of HOD Motion RC 10-22 includes access to prenatal services and 4th trimester proposed

Other regulatory Organizations

- CLEAR – opportunities for education - <https://www.clearhq.org/>

Credentialing Agencies

No New Updates

Correspondence from ED, Articles, etc. ○ FSBPT Treatment of Self, Family, Close Relation Position Statement ○ PTA Scope of Practice concerns – J. Hedrick ○ PTA Direct Supervision – K. Carrington ○ Medicaid – Owners & Managers

- Balancing the Public Good against Barriers to Entry in Professional Licensing (NC)
National Law Review April 2022

V. Future Quarterly NCBPTE Meetings

Upcoming Quarterly Board Meeting Dates and locations – all dates are Wednesdays

- September 14, 2022 – AIHF Conference Room 8300 HealthPark, Raleigh, NC 27615
- December 7, 2022 – Raleigh Marriott Crabtree, 4500 Marriott Drive, Raleigh, NC 27612

AA. Adjourn

Meeting adjourned by T. Hale, Chair, at 3:22 pm

Submitted,

Paula Brooks, Office Administrator
Recording Secretary

C. David Edwards, PT
Secretary-Treasurer

Attachment 2



Position Statement – NC Board of Physical Therapy Examiners

Pelvic Health in the NC Physical Therapy Scope of Practice

Adopted at the June 8, 2022 NC Board of PT Examiners Meeting

The Board reviews and makes determinations scope of practice questions for licensees based on several criteria including what is taught in entry level PT academic education and meets the criteria outlined in Board rule 21 NCAC 48C .0101 Permitted Practice: 21 NCAC 48C .0101 PERMITTED PRACTICE (a) Physical therapy is presumed to include any acts, tests, procedures, modalities, treatments, or interventions that are routinely taught in educational programs or in continuing education programs for physical therapists and are routinely performed in practice settings. The Board must consider training and practice throughout the state for consistency by allowing the Board to meet its legislative mandate of protecting the safety and welfare of the citizens of North Carolina and establishing minimum standards for the practice of physical therapy.

In the CAPTE Standards, 7C, is a required element that programs must respond to:

The physical therapist professional curriculum includes content and learning experiences about the cardiovascular, endocrine and metabolic, gastrointestinal, genital and reproductive, hematologic, hepatic and biliary, immune, integumentary, lymphatic, musculoskeletal, nervous, respiratory, and renal and urologic systems; system interactions; differential diagnosis; and the medical and surgical conditions across the lifespan commonly seen in physical therapy practice.

After careful review of the literature, discussion with subject matter experts, and consulting with educational institutions, the Board has determined that not only is it within the scope of PT practice, PTAs, and PT/PTA students who are trained and competent to do so may perform delegated portions of a PT plan of care related to pelvic health, both external and internal, rectal and vaginal, under the supervision of a qualified pelvic health trained PT. PT licensees supervising PTAs, PT/PTA students who are performing internal pelvic interventions should assure they comply with Board rules regarding student supervision and possess the education, training and competence to perform any aspect of the scope of practice they are performing. The ultimate responsibility for patient care rests with the NC licensed physical therapist.

To further clarify, “APTA Pelvic Health advises that physical therapy examination of and interventions to the internal pelvic muscles be taught to physical therapists, supervised physical therapist students and PTAs. PTAs may be instructed in examination and interventions of the internal pelvic muscles under the provision that this education is intended for foundational knowledge and that examination of the pelvic dysfunction should remain within the scope of the licensed physical therapist”. “Furthermore, interventions for pelvic dysfunction including, but not limited to, therapeutic exercise, neuromuscular re-education, manual therapy and behavioral retraining may require immediate and continuous examination and evaluation throughout the intervention while at other times may be relatively routine. In routine circumstances, those interventions may be delegated to PTAs and student physical therapists under direct supervision. When immediate and continuous examination and evaluation is necessary, those interventions should be performed only by a licensed physical therapist.” (APTA Pelvic Health)

The NCBPTE strongly encourages the following principles be satisfied whenever internal pelvic health evaluation and interventions are utilized:

- Informed consent and permission to treat be discussed with any patient and consent obtained prior to any internal pelvic health interventions
- The supervising PT needs to be appropriately trained in pelvic health in order to appropriately supervise PTAs, and student PT/PTAs, as this PT is legally, ethically, and professionally responsible for the oversight. Appropriate training, at a minimum, consists of: (see below ***)
- The educational institution's Clinical Coordinators of Clinical Education needs to ensure the student has proper training in pelvic health prior to a rotation specializing in pelvic health issues, and that the clinic Clinical Instructor is also properly trained to supervise in this area.
- Pessaries can be fitted by a PT if the PT possesses the requisite knowledge, skills, and training in women's health issues in order to fit female patients/clients with pessaries. Coordination of care with a qualified medical healthcare provider is recommended.
- Biofeedback, electrical stimulation, internal pelvic floor muscle techniques to perform soft tissue mobilization, using dilators or internal sensors vaginally or rectally, are all consistent with pelvic health techniques.

Any clinic can invoke additional standards and restrictions above the minimum position statement standards of PTA and student participation in pelvic health.

***Appropriate training and resources:

- Graduate of CAPTE approved DPT program and/or coursework as suggested below:
- [APTA Pelvic Health Level 1](#)
- [Herman and Wallace Pelvic Floor Level 1](#)
- Other Board approved courses that include, but are not limited to, the following topics:
 - Anatomy of the pelvic girdle
 - Physiology of micturition
 - Dysfunctions of the lower urinary tract
 - Dysfunctions of the pelvic muscles
 - Patient history examination
 - Testing and treatment interventions for the patient with underactive pelvic floor muscle conditions.
 - Urogynecologic surgeries
 - Medication
 - Prevention of pelvic floor dysfunction
 - Documentation

Resources:

- [CAPTE](#)
- [APTA Pelvic Health, an Academy of the American Physical Therapy Association](#)
 - [Position statement on Internal Physical Therapy Pelvic Examinations and Interventions](#)
 - [Position statement on Pessary Fitting and Management](#)

Attachment 3



INTEROFFICE MEMORANDUM

TO: NC BOARD OF PT EXAMINERS

FROM: KATHY O. ARNEY, PT, MA EXECUTIVE DIRECTOR

SUBJECT: DEFINITION ADVANCED TRAINING

DATE: 12-01-21; REVISED 03-09-22; 05-31-22

CC: DAVID C. GADD, ATTORNEY

The Board has recently been asked to respond to several inquiries regarding student performance of physical therapy interventions learned in entry level and whether they may be performed in clinicals prior to graduation. In addition, responses to scope of practice questions from the Board may utilize the term “advanced training.” For example, the Board has previously determined dry needling and internal pelvic examinations to be “advanced” skills that require advanced training.

The Board reviews and makes determinations on scope of practice questions for licensees based on several criteria including what is taught in entry level PT academic education and meets the criteria outlined in Board rule 21 NCAC 48C .0101 Permitted Practice. The rule states: Physical therapy is presumed to include any acts, tests, procedures, modalities, treatments, or interventions that are routinely taught in educational programs or in continuing education programs for physical therapists and are routinely performed in practice settings.

The Merriam-Webster definition of “advanced” is:

<p>1. far on in time or course - a man <i>advanced</i> in years</p> <p>2a: being beyond others in progress or ideas - tastes a bit too <i>advanced</i> for the times</p> <p>b: being beyond the elementary or introductory - <i>advanced</i> chemistry</p> <p>c: greatly developed beyond an initial stage - the most <i>advanced</i> scientific methods, <i>advanced</i> weapons systems</p>

Using the Board rule noted and the Merriam-Webster definition of the word “advanced”, students who are in the process of didactic and clinical training have not had advanced training. While some NC PT/PTA programs may choose to offer additional training not required as part of a required CAPTE entry level curriculum, the Board must consider training throughout the state for consistency and allowing the Board to meet its legislative mandate of protecting the safety and welfare of the citizens of North Carolina and establishing minimum standards for the practice of physical therapy.

To achieve advanced level skill, additional training is necessary to become competent. It is useful for licensees to participate in additional training via mentored practice for specific higher risk techniques prior to performing these in clinical practice. Therefore, for the reasons stated above, when the Board uses the term “advanced” it means “beyond entry-level” for the skill level or training required. This term is currently used in, but not limited to position statements and responses to scope of practice questions.

Attachment 4



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August 15, 2022

William W. Peaslee
Rules Review Commission Counsel
Office of Administrative Hearings
1711 New Hope Church Road
Raleigh NC, 27609

Via US Mail and email: bill.peaslee@oah.nc.gov

Re: Withdrawal of amendments to 21 NCAC 48B .0102, 21 NCAC 48E .0104, 21
NCAC 48F .0101, .0103, 21 NCAC 48G .0105, .0203, .0504

Dear Mr. Peaslee:

Pursuant to 26 NCAC 05 .0107(3), the North Carolina Board of Physical Therapy Examiners hereby withdraws the proposed amendments to the above referenced rules submitted to the Rules Review Commission on June 24, 2022. Please let me know if you have any questions. Thank you for your consideration.

Yours truly,

SATISKY & SILVERSTEIN, LLP



David C. Gadd
Board Attorney

Attachment 5



From: [Kathy Arney](#)
To: [Kathy Arney](#)
Cc: [Kathy Arney](#)
Subject: re Draft Monkeypox
Date: Tuesday, August 16, 2022 10:54:43 AM

DRAFT

In response to your emailed question to the NC Board of PT Examiners, the Board does not have the authority or rules to make determinations or recommendations regarding monkeypox. As a licensee you do have a duty to assure you are providing a safe environment for care. That said, a review resources re: Monkeypox are noted below (links to the CDC or NC DHHS websites); those websites, in conjunction with your patient policies or facility policies can guide your decision-making on those matters. The guidance can change, thus a recommend a review of these resources routinely to assist you in creating and updating policies for your practice or facility. I hope this is helpful to you.

<https://www.cdc.gov/poxvirus/monkeypox/index.html>

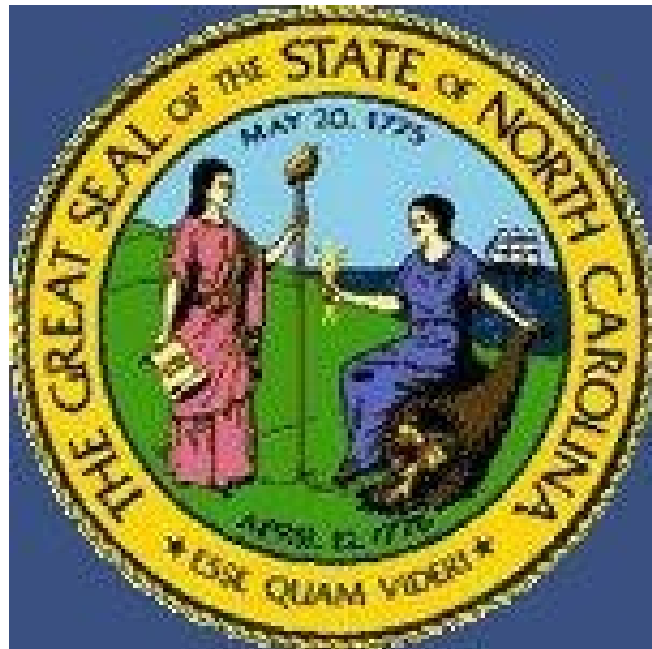
<https://www.ncdhhs.gov/divisions/public-health/monkeypox>

Kathy

Kathy O'Dwyer Arney, PT, MA
Executive Director
North Carolina Board of Physical Therapy Examiners
8300 Health Park, Suite 233
Raleigh, North Carolina 27615
Phone: (919)490-6393;(800)800-8982
Fax: (919)490-5106
email: karney@ncptboard.org
Web address: www.ncptboard.org

E-Mail correspondence to and from this address may be subject to the North Carolina Public Records Law "NCGS. Ch.132" and may be disclosed to third parties

Attachment 6





NCBPTE Licensee Counts

Category	08/17/2022	08/25/2021
All Licensees		
Active Licensees	14468	14082
Dropped licensees	14982	14227
Active licensees living in NC	12781	12327
Active licensees not living in NC	1687	1755
Compact Privileges	336	182
Military Temporary Permits	23	37
Physical Therapists		
Active licensees	10195	9826
Dropped licensees	11331	10883
Active PTs living in NC	8915	8508
Active PTs NOT living in NC	1301	1329
Active PTs working in NC	8896	8407
Active PTs NOT working in NC	1173	1174
Active PTs living in NC with no business address	1802	1628
Active PTs NOT living in NC with no business address	631	641
Physical Therapist Assistants		
Active licensees	4273	4256
Dropped licensees	3651	3394
Active PTAs living in NC	3887	3830
Active PTAs NOT living in NC	386	426
Active PTAs working in NC	3951	3790
Active PTAs NOT working in NC	380	368
Active PTAs living in NC with no business address	955	881
Active PTAs NOT living in NC with no business address	181	214
Miscellaneous		
Total Exam PTs	109	120
Total Exam PTAs	47	53
Total Endorsements PTs	280	239
Total Endorsements PTAs	89	85
Total Exam Failures	66	40
Total-increase of 2.74%	14468	14082



NCBPTTE Licensee Counts

Attachment 7



Report to the North Carolina Board of Physical Therapy Examiners

Temporary Exemptions from Licensure August 16, 2022

Kim Jackson
Executive Assistant

The Governor declared a State of Emergency for North Carolina (Executive Order 116) on March 20, 2020, and on April 8, 2020 issued Executive Order 130 to provide the state's healthcare occupational licensing boards with authority to consider and implement flexibility in licensure requirements during the COVID-19 pandemic. These Executive Orders and the NC Physical Therapy Practice Act granted the Board the authority to exempt qualified applicants from licensure requirements during the state of emergency. Physical therapists or physical therapist assistants licensed in another jurisdiction of the United States who enter North Carolina to provide physical therapy during a declared local, State, or national disaster or emergency may be granted an exemption.

Beginning April 15, 2020, the Board established policies and procedures to begin issuing exemptions from licensure equal to temporary privileges to practice physical therapy in North Carolina. An online application was made available on the Board website and the information recorded in an Excel spreadsheet. Once the application is received, the credentials (active license status) of the applicant are verified through a state's physical therapy licensing board website.

After verifying the license, a letter is generated granting the request and an email sent to the applicant. This information is recorded on another Excel spreadsheet that is uploaded to the Board website for online public access to verify practice privilege information. All requests for exemptions from licensure are assigned a number associated with the temporary privileges to practice in North Carolina. Those granted the exemption are monitored for changes that would require rescinding the exemption such as becoming licensed in North Carolina, or expiration of the other state license. In both cases, a notification email is sent to the license holder.

On July 11, 2022, the Governor of North Carolina announced that the State of Emergency would be lifted on August 15, 2022. At the beginning of August, the office notified all holders of exemptions from licensure that this temporary privilege to practice physical therapy issued by the NCBPTE would expire at midnight on August 15, 2022, and that they would need to have a North Carolina PT/PTA License or a Compact Privilege to continue practicing in the state.

The chart on the next page details activity through August 15, 2022.

Month	# of Requests via Website	Licenses Verified and Granted PT/PTA	Requests denied (reasons)	Exemptions Rescinded (received NC License) PT/PTA
April	50	43/5	2 (1 disciplinary action; 1 duplicate request)	0/0
May	31	24/6	1 (duplicate request)	2/0
June	31	26/4	1 (received NC license same day of request)	8/3
July	29	19/8	2 (1 duplicate request; 1 requested in error)	6/1
Aug	29	17/11	1 (requested in error)	7/4
Sept	20	15/5		12/5
Oct	18	13/5		10/3
Nov	21	17/4		4/2
Dec	30	24/6		11/2
Jan '21	27	21/3	3 (requested in error)	5/1
Feb	19	12/6	2 (requested in error)	8/3
March	5	3/2		8/0
April	16	9/5	2 (requested in error)	6/3
May	13	5/7	1 (requested in error)	2/1
June	9	8/1		4/0
July	12	6/4	2 (duplicate requests)	3/2
Aug	16	12/4		1/1
Sept	16	9/4	3 (1 unable to confirm license; 2 received NC license same day of request)	5/3
Oct	16	10/4	2 (requested in error)	3/2
Nov	14	11/3	1 (requested in error)	6/0
Dec	11	6/5		3/0
Jan '22	22	16/3	2 (requested in error); 1 (pending)	4/0*
Feb	19	15/3	1 (requested in error)	7/3
March	15	14/1		12/3
April	9	7/2		10/2
May	14	8/5	1 (pending)	3/1
June	5	4/0	1 (pending)	2/0
July	21	17/4		7/0
August	5	5/0		8/0
Total	543	395/120	27	165/45

* 2 Temporary privileges were revoked when an audit showed that the PT license issued in another state had expired.

Attachment 8



From: [Kathy Arney](mailto:karney@ncptboard.org)
To: [Kathy Arney](mailto:karney@ncptboard.org)
Cc: [Kathy Arney](mailto:karney@ncptboard.org)
Subject: FW: Important: Regarding end of NC State of Emergency - Please Review
Date: Wednesday, August 10, 2022 2:04:48 PM

From: karney@ncptboard.org <karney@ncptboard.org>
Sent: Tuesday, August 9, 2022 8:34 AM
To: Gregg G. Seipp <gregg@ncptboard.org>
Subject: Re: Important: Regarding end of NC State of Emergency - Please Review

You are receiving this email because you have been issued a North Carolina temporary exemption from licensure to practice as a PT or PTA due to the COVID 19 related NC State of Emergency. Governor Cooper announced in July 11, 2022 that he would end the state of emergency Monday, August 15, 2022. An Executive Order rescinding the state of emergency has not yet been issued.

Once the NC state of emergency ends, you will no longer be able to practice physical therapy legally in the state unless you have a NC PT or PTA license or physical therapist or physical therapist assistant PT Compact privilege. To prepare for the end of the state of emergency, if you plan to continue practicing PT in the state, please do the following:

- Notify your employer that the NC State of Emergency may be ending August 15, 2022 and
- Obtain a PT or PTA license via the NC Board of PT Examiners website: <https://www2.ncptboard.org/> or
- Obtain a PT or PTA Compact privilege by going to the PT Compact Commission website: <https://ptcompact.org/How-to-Get-Privileges>

Thank you for assisting North Carolina patients meet their physical therapy needs during the NC State of Emergency.

Kathy O'Dwyer Arney, PT, MA

Executive Director

North Carolina Board of Physical Therapy Examiners

8300 Health Park, Suite 233

Raleigh, North Carolina 27615

email: karney@ncptboard.org

Web address: www.ncptboard.org

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Attachment 9



NCBPTE Strategic Plan

Fiscal Year 2023

Adopted June 8, 2022

Vision - Strive, through regulation, to support provision of competent and ethical physical therapy services to the public

Core Purpose/ Mission - To establish and maintain minimum physical therapy standards to protect the citizens of NC

Core Values – We A.R.E – Accountable, Responsive and Ethical

Goals: In the next 2 – 5 years - Outcomes to achieve our mission

Highest Priority:

Board Performance – Operations (Board)

- **Staffing Transitions** - Obtain highest quality prepared staff during transitions and minimize loss of institutional knowledge through planning
- **Information Technology and Systems - Technology/Security for the future** – Assurance all data is secure and if breached, executable plans are in place for retrieval and restart of business within 5-7 days.
- **Digitization of Licensing/Complaints/Investigations and Discipline** - Accessible electronic processes enabling data informed decisions and data access upon request

Board Performance – Fiduciary Responsibilities (Board)

- **Maintain Office space** (physical and virtual) – work toward paperless office, with staff and public access to work duties and services; Realizing reduction of expenses to do business and increased services without licensee fee increases
- **Prudent fiscal responsibility and use of Board funds, personnel and resources** through data informed decision-making and accurate analysis of business and environmental risks

Physical Therapy Practice & Licensure – Standards (practice, licensure, complaints)

- **Establish and evaluate Risks and Harms in PT Practice and Practice Evolution** – continue to thoroughly evaluate and create regulatory policy based on methods, PT regulatory statutes and rules to protect the public in an evolving healthcare world and PT educational and practice environment

Public Outreach and Education – External Communication (Schools, NLs, website, other communications, relationships)

- Continue posting and updating Board Scope of Practice decisions, approved Board minutes and other relevant documents on the website
- Increase frequency of Newsletters published by the Board to 2 per year in FY2023
- Analyze use of social media by the Board, providing alternative method to reach the public with information

Objectives: objective measurable success

Staffing Transitions:

- Licensing Team Reorganization
 - New Licensing Manager – July 1, 2022
 - Determination of Licensing Coordinator – as determined by Licensing Manager – 12-31-22
- Senior Management Physical Therapist – PT hire process begins by September 31, 2022; hire 12-31-22
- Other Senior Board Staff transitions – planning
 - IT Director – July 1, 2023
 - Executive Director – March 1, 2023

Information Technology and Systems:

- Strategic Planning Meeting 2023 and beyond – November 2022
 - Technology/Security for the future
 - Completion of strategic plan for 2022

Evaluate Risks and Harms in PT Practice and Practice Evolution – throughout FY2023

- Address scope of practice topics using P.E.E.R Review and publish Board responses: Board:
 - Pelvic Health scope of PT/PTA/Students and supervision of evaluation, interventions and competence requirements
 - Imaging Referral for PTs
 - Informed Consent
 - Other topics as time and priority dictate

Public Outreach and Communications - by December 2023

- Analyze use of social media by the Board, providing alternative method to reach the public with information
- Increase the frequency and create a template for ongoing Board self-published newsletters

Strategic Initiatives: 1-year actions to achieve Goals/objectives

Staffing Transitions:

1. Licensing Team Reorganization
 - a. Leadership
 - i. Deputy Director – steps back and becomes mentor to new leadership
 - ii. Current longest serving Senior Licensing Specialist becomes Licensing Coordinator (planned for in FY23 budget) – F-T, Remote; pay increase and increased responsibility: responsible for day-to-day operations within licensing team; facilitates licensing functions; coordinates staff duties; reports to Licensing Manager
 - iii. Licensing Manager – Bookkeeper will add additional responsibilities for Licensing Team oversight. P-T approx. 10 hours per week – pay differential for the additional 10 hours; add benefits. Hybrid. Metrics established for Team will be monitored and coached, policy and procedure issues and evolution will be

- brought to the Manager via Coordination and addressed as Manager dictates with ED/DD input and oversight.
- b. Senior Management Physical Therapists (planned for in FY23 budget)
 - i. DD – role focuses primarily Scope of Practice, Continuing Competence, Task Force/Task Force research and facilitation as determined by ED; Mentorship of Licensing Manager and new hire Professional Standards staff
 - ii. New Hire – Professional Standards Director – depending on experience, entry level regulatory position F-T in office with remote capability; wage and salary scale entry level PT professional exempt; focus on all scope of practice and regulatory issues for licensees. May increase newsletters, add other outreach which may include social media. Eventual consideration for senior management
 2. Begin planning of transition – approximate timeline of implementation, when needed:
 - a. IT Director
 - b. Executive Director
 3. Physical Therapy Practice and Complaint Resolution
 - a. Risks and Harms in PT Practice and Practice Evolution
 - b. Begin planning Digitization of Licensing/Complaints/Investigations and Discipline
 - i. Big project overview
 1. Outline processes to be digitized
 - a. Prioritize and coordinate execution with IT
 4. Information Technology – planned for in budget FY’23
 - a. Replace IT consultant programmer
 - b. Begin planning Digitization of Licensing/Complaints/Investigations and Discipline
 - c. Annual IT Strategic plan FY2022
 - i. On track
 - ii. Execute transition to Microsoft office 365
 1. Seamless transition
 2. Utilize all features and eliminate duplications noted – IM and remote meetings
 - iii. Technology/Security for the future
 1. Creation of strategic plan
 - iv. Schedule next planning for FY 23 in summer 22
 5. Office space
 - a. Building sale
 - i. sign estoppel agreement
 - ii. determine if lease can be negotiated
 1. decrease terms (years and increase per year)
 2. sublease options

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 - iv. Schedule next planning for FY 23 in summer 22
 5. Office space
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 - i. sign estoppel agreement
 - ii. determine if lease can be negotiated
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North Carolina Board of Physical Therapy Examiners Strategic Plan - FY 2023

Board Adopted - June 8, 2022

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CORE PURPOSE / MISSION- To establish and maintain minimum physical therapy standards to protect the citizens of NC

CORE VALUES - We **A.R.E** – Accountable, Responsive and Ethical

Goals

Board Performance – Operations

Outreach and Education – External Communications

Physical Therapy Practice and Licensure

Board Performance – Fiduciary Responsibilities

Objectives / Initiatives

- Staffing Transitions
- Licensing Team Management
- Senior PT Manager
- Planning future Senior Manager
- IT Strategic Planning FY '23
- Automate Complaint /Disciplinary internal process

- Maintain current information on a real-time primary source website
- Evaluate public communications through additional media sources
- Newsletter increased frequency

- Analyze risk and harms in PT practice creating /updating standards
- Consistent, transparent licensing standards and Board decisions
- PT Compact – compliance and accountability

- Execute Fiduciary Responsibilities using updated policies
- Prudent Use of Reserves
- Office Space long-term evaluation

Attachment 10



memo

North Carolina Board of Physical Therapy Examiners

To: NC Board of PT Examiners Board Members
From: Kathy Arney, Executive Director
CC: David Gadd
Date: 09-14-22
Re: Office Operations Update

Office Operations

I. Office Hours

To best serve the public and balance in-office, remote and hybrid staffing in the office, the Board staff hours will remain 7:30 a.m. – 4 p.m., 5 days per week. In-office staff availability for the public will be 10:00 a.m.– 2:00 p.m. Tuesday – Thursday or by appointment.

Website Posting will reflect the following: Board Office staff are available to respond to phone call and email inquiries within 24 hours. In-office appointments may be scheduled in advance 10:00 a.m.– 2:00 p.m. Tuesday – Thursday by emailing PTBoard@ncptboard.org. Provide name, email address, best phone contact number and a brief description of the need for an appointment.

(These public notifications and hours changes will direct the public on how to best access Board services. Email and scheduled appointments provide staff an opportunity to research information and formulate effective answers prior to meeting or responding. While we are shorter staffed in the office, this is an initiative-taking way to manage resources. As the office moves to a more “paperless office,” and there are real-time digital solutions for services to the public, we can also achieve remote and hybrid work opportunities, thus engaging highly qualified staff who expect the flexibility technology offers.)

II. Fax

While streamlining office operations during the pandemic, accidentally, one of the phone lines was removed that enabled fax line functions. After evaluating the current office situation of in office and remote workers, eFax presents a cost-effective solution. The number of faxes that needed to be sent in the last year FROM the office was one; on occasion, faxed documentation is accepted for applications or other Board requested or required information.

All workers would have access to the service. To enable eFax, a phone line is assigned by an outside vendor for approximately \$2 per user per month. After the number is assigned and staff is trained this number will need to replace prior fax numbers on all Board publications, stationary, and website. This will occur in the coming months.

III. Phones

It has been determined that the current office phone system is now obsolete. The former contractor who provided service to the phone system is retired and Avaya, the maker of the phone system and software (purchased approximately 4 years ago), notified us that this system is no longer supported. Information Technology staff is considering a "Soft Phone" alternative, and has requested a quote for a Microsoft TEAMS phone solution which can be used by Office Staff and Hybrid Staff. This will be further evaluated and implemented in the coming months.

Attachment 11



NC Board of PT Examiners Budget 2022 - 2023

	21 - 22 A	22 - 23 B	VOB	Comments
Income				
Credit Card Cost - Military	122	105	(17)	
Credit Card Processing Cost	70,952	78,200	7,248	All payments CC starting 2022
FBI/CBC Background check fees	46,099	43,000	(3,099)	
CC Licensee	375	300	(75)	
CC Business	450	300	(150)	
NC License Verif (CCard)	26,660	12,500	(14,160)	
NC License Verif (by check)	67	150	83	
PT Income				
<i>PT Compact privilege app cost</i>	7,350	7,000	(350)	
<i>PT Exam Fee</i>	7,500	8,000	500	
<i>PT Endors Fee</i>	450	600	150	
<i>PT-OnlineExamApp</i>	52,500	56,000	3,500	
<i>PT Online End</i>	62,820	64,000	1,180	
<i>PT Online-EXOST</i>	5,250	4,000	(1,250)	
<i>PT Renewal by Check-ACH</i>	2,903	-	(2,903)	
<i>PT Renewal Credit Cards</i>	1,135,936	1,138,839	2,903	
<i>PT Revive by payment</i>	5,250	6,000	750	
<i>PT Revival Fee CC</i>	2,100	2,000	(100)	
<i>PT Rev by Ed Hours</i>	300	300	-	
<i>PT Rev by End</i>	6,900	7,000	100	
Total PT Income	1,289,259	1,293,739	4,480	
PTA Income				
<i>PTA Compact privilege appl cost</i>	3,850	4,500	650	
<i>PTA Exam Fee</i>	1,800	2,000	200	
<i>PTA Online Exam App</i>	20,400	19,000	(1,400)	
<i>PTA Online End</i>	14,100	15,000	900	
<i>PTA Online-EXOST</i>	1,500	1,200	(300)	
<i>PTA Renewal Credit Card</i>	481,080	481,080	-	
<i>PTA Rev by Ed Hours</i>	750	600	(150)	
<i>PTA Rev by End</i>	3,900	3,400	(500)	
<i>PTA Revive by payment</i>	4,800	5,600	800	
Total PTA Income	532,180	532,380	200	
Certificates (wall & Lic Card)	90	100	10	
Certified Copies	30	-	(30)	
Discipline Reimbursement	1,379	1,400	21	
Interest Income	5,950	6,000	50	
Other Rewards Income	1,692	2,000	308	
Total Income	1,975,305	1,970,174	(5,131)	

	21 - 22 A	22 - 23 B	VOB	Comments
Expense				
Personnel				
Total Gross Wages	856,112	895,000	38,888	Deputy Director in Training add 9/1/2022
Total Insurance	153,124	160,000	6,876	
Retirement Contribution	46,827	51,200	4,373	
Retirement Fees	5,469	3,500	(1,969)	
Total Payroll Taxes	62,755	66,500	3,745	
Total Other Employee Benefits	4,453	31,950	27,497	Employee Ed Travel & IT travel
Total Continuing Educ	1,507	4,000	2,493	
Total Consulting-Contract Labor	219,392	284,000	64,608	Increase in hourly rate, additional resources
Total Personnel	1,349,639	1,496,150	146,511	
Board Members				
Total Subsistence	3,359	11,880	8,521	
Total Travel	3,304	16,100	12,796	
Total Meetings	45	2,800	2,755	
Total BD Per Diem	6,631	8,800	2,169	
Total Board Members	13,339	39,580	26,241	All meetings in person for Budget
Total Professional Fees	100,981	243,100	142,119	Includes direct mail and credit monitoring
Investigations Expense	20,924	31,900	10,976	
Total Information Technology	70,149	70,700	551	Wrote off \$6,700 asset in 2022
Total Licensing	43,510	43,000	(510)	
Total Office Expense	114,372	123,975	9,603	Annual Rent Increase
Credit Card Fees	80,934	90,200	9,266	All payments CC starting 2022
Insurance/office/Prop/Honest	15,765	30,500	14,735	
NC Professional Health Program	7,500	22,500	15,000	New Program
Miscellaneous Expense	991	1,000	9	
Total Expense	1,818,104	2,192,605	374,501	
Net Ordinary Income				
Disposition of Fixed Assests	(18,999)	-	18,999	Write-off of assets no longer owned (2021)
Net Income	138,202	(222,431)	(360,632)	

Attachment 12



NC Board of PT Examiners
Statement of Financial Position
As of June 30, 2022

ASSETS	
Cash & Investments	3,312,157
Prepaid Expense	18,526
Prepaid Rent	6,955
Current Assets	<u>3,337,638</u>
Furniture & Equipment	246,729
Accumulated Depreciation	<u>(178,957)</u>
Fixed Assets	<u>67,772</u>
TOTAL ASSETS	<u><u>3,405,410</u></u>
LIABILITIES & EQUITY:	
Liabilities:	
Accounts Payable	76,574
Accrued Vacation Pay	119,942
Payroll Liabilities	1,173
Total Liabilities	<u><u>197,688</u></u>
Equity:	
Payroll Reserve	600,000
Continuing Education Reserve	50,000
Replacement of Property & Equip	200,000
Information Technology Reserve	300,000
Unanticipated Investigations	200,000
Unanticipated Litigation costs	1,250,000
Undesignated Funds	607,721
Total Equity	<u><u>3,207,721</u></u>
TOTAL LIABILITIES & EQUITY	<u><u>3,405,410</u></u>

Attachment 13



I.	<p>Continuing Competence Action Items</p> <p>a. Exemptions- 0 new hardship requests since last meeting. Currently we have a total of 22 exemptions for over 65.</p>
II.	<p>Summary of Deputy Director Activities (since the June Board meeting, 2022) As with everyone, many activities and duties during the past 3 months are heavily influenced by the NCBPTE website outage.</p> <p>a. Rules</p> <p>i. There will be a motion to withdraw the Board’s proposed permanent rules below:</p> <ul style="list-style-type: none">• 21 NCAC 48B .0102• 21 NCAC 48E .0104• 21 NCAC 48F .0101 and .0103• 21 NCAC 48G .0103, .0105, .0203, and .0504 <p>b. Course Approvals</p> <p>We continue to review and approve courses for continuing competence credit and have approved 11 to date since the beginning of 2022.</p> <p>c. School Outreach- The Board has now been an AAP participant for almost 2 years. We are still communicating with schools about sending transcripts when degree is conferred. Board staff actively pursued methods to improve the quality of the transcripts we receive, thus better ensuring their security and official status. We now have a contract with Parchment which both sends the transcripts, and maintains them in a secure database. We also pursued Student Clearing House, but they have not expressed any options for improved transcript services. With the website outage this summer we did again take some certification of education forms as long as they were submitted on or after the date the degree was conferred.</p> <p>d. Staff Meetings and Follow-up</p> <p>i. Continue to have daily Teams sessions with the licensing team as they work remotely to ensure work-flow efficiencies and troubleshoot any barriers. This summer included a significant amount of document recovery and communication with applicants regarding their individual statuses because of the website outage. We also worked with several individuals with temporary exemptions to facilitate licensure or compact privileges to allow them to continue practicing in NC.</p>
	<p>Special Projects- Working in Conjunction with the Executive Director</p> <p>a. Record Retention projects:</p> <ul style="list-style-type: none">• Merging revivals with permanent files- to be completed summer 2022

	<ul style="list-style-type: none">• Still not destroying applications over a year old that expired after 4/2020 due to current regulatory flexibility for COVID. Reaching out to endorsement applicants who have not completed their application to date.• Record retention for those applicants licensed in 2016, to prepare for merging with permanent files. Will merge with permanent files and begin retention on 2017 files. <p>b. Newsletter- Working on bringing the newsletter process in house.</p> <p>c. Board Support-Researching scope of practice questions is ongoing</p> <p>d. Criminal background checks- Maintaining excellent relationship with the SBI. Average turnaround time for fingerprint processing once fingerprint cards mailed to SBI via Fed Ex is again back to about 5 weeks.</p> <p>e. Military Expedited Process- Reviewed and revised the Military Expedited Process for the Temporary Permit in November in preparation for the effective Dec. 1, 2020 date for the revision of PART I. MILITARY SPOUSE OCCUPATIONAL LICENSURE SECTION 1. G.S. 93B-15.1 reads as rewritten: "§ 93B-15.1. Licensure for individuals with military training and experience; proficiency examination; licensure by endorsement for military spouse's temporary license. Turnaround time for military permits since last Board meeting up until 8/17/22 is 2.8 days (for 9 permits).</p> <p>f. Licensing Team Update- Upload feature for character references has been restored. Hoping the photo, ARI, and military ID upload features will be restored once the security has been assured.</p> <p>License Verifications-Added a second generic email for all outgoing license verifications. The first one acknowledges receipt of the 30 dollars. The second acknowledges that the license verification has been sent.</p> <p>Online Revivals- Working with the licensing team and IT to make the revivals more consistent as an internal process.</p> <p>Criminal Background Checks- Starting to cross-train all licensing staff in the fingerprint to CBC process with the goal of merging all emails about CBCs to PTBoard@ncptboard.org and deleting the cbc.licensing@ncptboard.org email folder. This will ultimately provide a better customer experience for the applicant. Each will be able to establish the online relationship with one licensing specialist throughout their application to licensure process. Also cross training on how to retrieve the dates the CBCs arrive at the Board office.</p> <p>g. Public Records Requests – We have developed an in-house method to expedite licensee list requests from external requestors at no charge</p>
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Board Report for NCBPTE Meeting

Continuing Competence

September 14, 2022

Submitted by Deborah J. Ragan, PT, DPT, NCBPTE Deputy Director

	<p>h. Compact Updates- Board staff continues to work to ensure the JE is done again both with renewal and purchase, and as always, the public can find out on our website and the Compact website if someone has a privilege in NC and the status of that privilege. Currently working with one Compact privilege renewal holder about retaking the JE.</p>
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Attachment 14



INTEROFFICE MEMORANDUM

TO: KATHY ARNEY

FROM: GREGG SEIPP

SUBJECT: IT HIGH LEVEL PROJECTS ,

DATE: AUG 22, 2022

CC:

-
- **Phones (Completed)** – We have procured cell phones for licensing staff for them to make business calls.
 - **FSBPT Sharefile Integration (Completed)**– FSBPT has created a new server for state Boards to transmit their data. We have integrated our feed with this new service.
 - **Admin Tool enhancements (Completed)** – We make ongoing enhancements to the Admin tool. During this period we have added two new Application reports to aid licensing workflow and tracking.
 - **New Office Router (Completed)** – We are replacing an old Linksys router with a more advanced and secure SonicWall router that has much greater functionality for security and traffic flow.
 - **Office 365 (Completed)** – The O365 project ran into several difficult obstacles during the prior quarter which we are steadily working through. We are now anticipating completion before the Board meeting.
 - **Server Procurement (Completed)**
 - **FSBPT API for Licensure data (in progress)** – This is a joint project between NCBPTE and FSBPT to automate the sharing of data through a modern interface. Work has begun and we are now nearing the 50% completion mark. **Our current estimate, based on the current documentation documents and availability of the service, Oct 1.**
 - **Shopping Cart (in progress)** – Implement a way for licensees to complete all payments online instead of mailing them in. Will reduce manual work and streamline processing. We are also consolidating and streamlining the payment processing for all payments, preparing for other future types. As of now, all the core pieces are complete. **We are wrapping up the last two payments. Estimate completion Nov 1 based on current requirements and other workload.**
 - **Online Revival (planning)** – Make it so that people can revive their licenses online, without having to send in a paper application. We'll leverage existing wizards and are gathering requirements. – **our estimate completion based on previous projects and requirements gathered so far – Jan 1**

- **Port Admin tool to use the same tech as the website** – We decommissioned older technology when we upgraded to the new website. Upgrading the Admin tool in the same way will help us speed development, simplify some complex things and prepare us for moving to the Cloud. – **estimate 4 months of effort.**
- **Migration to the Cloud (planning)** – This project will move the website and admin tool to the NCDIT "Cloud". It will improve monitoring and security, aid with patches and configuration and provide redundancy. **This is in early stages. We'll provide an estimate by the next Board meeting.**
- **Security/Recovery work completed since Jun 18:**
 - **Data recovery - ongoing**
 - **Website functionality - 100% complete**
 - **Harden computer security - Complete**
 - **Database encryption - Complete**
 - **New firewalls - Complete**
 - **New external web site firewalls - Complete**
 - **New Vulnerability Management System (VMS) - Complete**
 - **Network partitioning - Complete**
 - **VPN 2-factor authentication - Complete**
 - **Penetration tests (simulated attacks) - 3 completed**
 - **Code review, security enhancements - Complete**

Attachment 15



NCPT Board Member Laptop Agreement Form

Assigned Equipment	Details
Laptop Model #	
Laptop Serial #	
Accessories	Assigned? Y/N
Headset	
Camera	
Carrying Case	

In acceptance of this device for usage, I agree to the terms and condition stated below:

- I understand that I am responsible for the laptop whilst in my possession
- I am responsible for keeping the laptop in good condition while using it
- I understand that I should not install any program or software that is not permitted to use by the Board, for privacy and security reasons
- I should be the only authorized person to have access to and use this laptop, any unauthorized access to this laptop is a violation of this Board's policy
- I should remove all data that is Board related before the end of term as Board member
- In the event of loss, theft, or damage, this must be reported to the police and/or the Board within 24-48 hours, a copy of a police or incident report must be submitted to the Board for verification purposes
- I understand that any violation of these policies is a violation and I am subject to any action deemed necessary by the Board

Board Member Signature: _____

Date: _____

Assigned/Released By: _____

Attachment 16



Cybersecurity Best Practice

- Do not write down or post password in conspicuous places (sticky notes, labels, etc.)
- Lock or sign out of computer anytime it is left unattended
- Avoid public Wi-Fi networks that are not password protected
- Be wary of unsolicited email attachments and links
- Always keep computers and software up to date
- Notify IT ASAP if you notice any suspicious activity on computer
- Contact Info: david@ncptboard.org (318) 505-2447

Attachment 17



Pass Rates by School for NORTH CAROLINA

Graduation Year: 2019

Report Date: Friday, August 12, 2022
Data Current as of: Monday, August 8, 2022

Program	Code	School	First Time Pass Rate	Ultimate Pass Rate	Total Candidates
PT					
	3421	High Point University (PT)	0.00%	0.00%	0
	3401	Duke University (PT)	86.84%	100.00%	76
	3402	East Carolina University (PT)	88.89%	100.00%	27
	3403	University of North Carolina at Chapel Hill (PT)	96.67%	100.00%	30
	3411	Winston-Salem State University (PT)	96.15%	100.00%	26
	3412	Western Carolina University (PT)	96.67%	100.00%	30
	3414	Elon University (PT)	85.11%	100.00%	47
	3418	Campbell University (PT)	84.62%	97.44%	39
	3419	Wingate University (PT)	100.00%	100.00%	42
	3422	Methodist University (PT)	90.48%	100.00%	42
		NORTH CAROLINA Total (PT)	90.81%	99.72%	359
		All U.S Accredited Programs (PT)	90.48%		10953
PTA					
	3408	Stanly Community College (PTA) - Accred. Withdrawn	0.00%	0.00%	0
	3420	South University - High Point (PTA) - Accred. Withdrawn	0.00%	0.00%	0
	3423	Rowan-Carrabus Community College (PTA)	0.00%	0.00%	0
	3404	Central Piedmont Community College (PTA)	86.96%	100.00%	23
	3405	Fayetteville Technical Community College (PTA)	93.33%	100.00%	15
	3406	Martin Community College (PTA)	87.50%	100.00%	16
	3407	Nash Community College (PTA)	100.00%	100.00%	18
	3409	Caldwell Community College and Technical Institute (PTA)	90.00%	100.00%	20
	3410	Southwestern Community College (PTA)	100.00%	100.00%	12
	3413	Guilford Technical Community College (PTA)	100.00%	100.00%	22
	3415	South College - Asheville (PTA)	59.26%	81.48%	27
	3416	Surry Community College (PTA)	85.71%	92.86%	14

Program	Code	School	First Time Pass Rate	Ultimate Pass Rate	Total Candidates
	3417	Craven Community College (PTA)	68.42%	94.74%	19
		NORTH CAROLINA Total (PTA)	85.48%	96.24%	186
		All U.S Accredited Programs (PTA)	83.81%		6852

Attachment 18



Compliance Report

Board

Physical Therapy Examiners, Board of



Submit

[Export list to .CSV](#)

<u>Full Name</u>	<u>Appointment Start Date</u>	<u>Appointment End Date</u>	<u>Last SEI Received Date</u>	<u>Last Education Received Date</u>	<u>Next Education Due Date</u>
Kathleen Arney(EL)				04/20/2022	04/20/2024
Paul Garcia	10/27/2016	12/31/2022	03/06/2022	01/09/2021	01/09/2023
Teresa Hale	01/24/2018	12/31/2023	03/10/2022	03/08/2022	03/08/2024
Charlie Edwards	01/24/2018	12/31/2023	04/05/2022	03/17/2022	03/17/2024
Megan Wentz	12/10/2021	12/31/2023	04/19/2022	03/10/2022	03/10/2024
Stephanie Bernard	01/01/2022	12/31/2024	04/19/2022	06/13/2022	06/13/2024
Rosa Gonzalez	05/04/2020	12/31/2022	04/19/2022	07/06/2022	07/06/2024
Leslie Kesler	01/15/2019	12/31/2024	01/03/2022	01/01/2021	01/01/2023
Jamie Miner	01/02/2020	12/31/2022	03/22/2022	03/06/2022	03/06/2024

1 - 9 Of 9 Records

Pg Of 1