

Ohio Occupational Therapy, Physical Therapy and Athletic Trainers Board  
**Athletic Trainers Section Meeting**  
**May 7, 2014**  
9:00 a.m. Roll Call  
77 South High Street, 31st Floor, South A  
Columbus, Ohio 43215

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**1. Administrative Matters**

1.1 Agenda Review

1.2 Approval of Minutes

**Action Required**

1.3 Executive Director Report (15 Minutes)

1.4 Executive Session: *TBA*

1.4.1 To discuss pending and imminent court action (*ORC 121.22 (G)(3)*)

1.4.2 To discuss personnel matters related to:

- Appointment; Employment; Dismissal; Discipline; Promotion; Demotion; Compensation (*ORC 121.22 (G)(1)*)
- Investigation of charges/complaints against a public employee, licensee, or regulated individual in lieu of a public hearing (*ORC 121.22 (G)(1)*)

1.4.3 To discuss matters required to be kept confidential by federal law, federal rules, or state statutes (*ORC 121.22 (G)(5)*)

1.5 Discussion of Law and Rule Changes

**2. Administrative Reports**

2.1 Continuing Education (*5 Minutes*)

2.1.1 Application for Waiver of Continuing Education

2.1.2 CE Denial Appeal

2.1.3. CE Request for Approval

2.2 Event Approvals (*5 Minutes*)

2.3 Licenses (*5 Minutes*)

2.3.1 Athletic Training Licensure Applications

**Action Required**

2.3.2 Licensure Renewal Report

2.4 Adjudication (*10 Minutes*)

2.4.1 Enforcement Report

2.4.2 Notice(s) of Opportunity for Hearing

2.4.3 Consent Agreement(s)

2.4.4 Releases from Consent Agreements

2.4.5 Affidavit Consideration(s)

2.4.6 Hearing Officer Report(s)

2.4.7 Summary Suspension(s)

- 2.4.8 To discuss proposed disciplinary action against a licensee pursuant to ORC 121.22 (G)(1) and pursuant to 121.22 (G)(5) that involve matters required to be kept confidential under ORC sections 149.43 (A)(2) and 4755.02 (E)(1)

**3. Assistant Attorney General Report (5 Minutes)**

**4. OATA Report (5 Minutes)**

**5. Open Forum (5 minutes)**

**6. Old Business (5 Minutes)**

6.1 Scope of Practice Guidance

6.2 Finalize OATA Presentation

**7. New Business (20Minutes)**

7.1 Review Draft of Technology Summary

7.2 Review and Vote to File New Rule 4755-43-12

**Action Required**

**8. Correspondence**

**9. Next Meeting Preparation**

9.1 Agenda Items

9.2 Executive Director Assignments

**10. Adjournment**



Ohio Occupational Therapy, Physical Therapy,  
and Athletic Trainers Board

*Athletic Trainers Section*

*March 6, 2014*

*9:00 a.m.*

**Members Present**

Jason Dapore, DO  
Aaron Galpert, AT, Chair  
Brian Hartz, AT, PhD  
Kimberly Peer, AT, EdD, Secretary  
Trevor Vessels, Public Member

Susan Stevens, AT, EdD

**Staff**

Jeffrey Rosa, Executive Director

**Guest**

Paul Miller, OATA

**Members Absent**

**Call to Order**

Aaron Galpert, Chair, called the meeting to order at 9:01 a.m.

**Approval of Minutes**

**Action:** Brian Hartz moved that the minutes from the January 8, 2014, meeting be approved as submitted. Jason Dapore seconded the motion. The motion carried.

**Discussion of Law and Rule Changes**

The Executive Director reported that the Board did not receive any comments on the HB98 rules pertaining to occupational licensing for military members, spouses, and veterans.

**Administrative Reports**

**Licensure Applications**

**Action:** Brian Hartz moved that the Athletic Trainers Section ratify, as submitted, the athletic training licenses issued by examination, endorsement, and reinstatement by the Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board from January 8, 2014, through March 6, 2014, taking into account those licenses subject to discipline, surrender, or non-renewal. Kimberly Peer seconded the motion. The motion carried.

**Examination Applicants**

Anderson, Ashley  
Butler, Mathew  
Gregorich, John  
Thomas, Nicholas

Bennett, Tyler  
Diamond, Bethany  
Hubbard, William  
Wells, Amanda

Branski, Jarad  
Gipson, Kourtney  
Jansen, Jessica  
Wisniewski, Steven

**Endorsement Applicants**

Ridner, Timothy  
Violette, Danielle

Tatarski, Rachel  
Wilson, Samantha

Turkowski, Kristylyn  
Wuestefeld, Rachael

**Reinstatement Applicants**

Desrochers, Jana

Magat, Brian

**Continuing Education Approval**

Brian Hartz reported that three continuing education applications were approved since the January 8, 2014 meeting.

**Event Approval**

None

### **Assistant Attorney General Report**

Yvonne Tertel, AAG had no formal report for the Section.

### **Case Review Liaison Report**

Brian Hertz reported that the Enforcement Division opened one new case and closed two cases since January 8, 2014 meeting. There are two cases currently open. There is one consent agreement being monitored.

Brian Hertz informed the Section that Cynthia Zilko complied with all terms and conditions and was released from her disciplinary consent agreement.

### **Enforcement Actions**

None

### **Old Business**

None

### **New Business**

#### **Review Draft of Technology Summary**

Brian Hertz provided a brief overview of the technology summary. The Section encourages athletic trainers to communicate with their employers to establish guidelines to address critical technology issues in athletic training practice. The Section will review the revised technology summary at the May 2014 meeting. The completed document will be distributed as a white paper and published in the OATA newsletter.

#### **Scope of Practice Review Guidance**

The Section reviewed the scope of practice guidance document. The Section made revisions to the document. The Executive Director will forward a copy to the Section members for additional comments.

### **Correspondence**

None

### **Ohio Athletic Trainers Association (OATA)**

Paul Miller had no formal report for the Section. OATA encourages the Section to share with OATA the information about the upcoming rules for inclusion in the OATA newsletter. Kimberly Peer reported that the Section will give a presentation at the upcoming OATA Conference. Kimberly Peer will coordinate the presentation for the Section.

### **Open Forum**

None

### **Items for the Next Meeting**

- Review Draft of Technology Summary
- Scope of Practice Guidance
- Rules Hearing

**Next Meeting Date**

The next regular meeting date of the Athletic Trainers Section is scheduled for Wednesday, May 7, 2014.

**Adjournment**

**Action:** Brian Hartz moved that the meeting be adjourned. Kimberly Peer seconded the motion. The motion carried. The meeting adjourned at 9:30 am.

Respectfully submitted,  
Diane Moore

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Aaron Galpert, AT, Chair  
Ohio Occupational Therapy, Physical Therapy, and  
Athletic Trainers Board, Athletic Trainers Section

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Kimberly Peer, AT, Secretary  
Ohio Occupational Therapy, Physical Therapy, and  
Athletic Trainers Board, Athletic Trainers Section

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Jeffrey M. Rosa, Executive Director  
Ohio Occupational Therapy, Physical Therapy, and  
Athletic Trainers Board

**KP:jmr:dm**



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## Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board

77 South High Street, 16<sup>th</sup> Floor  
Columbus, Ohio 43215-6108

Governor  
*John R. Kasich*  
Executive Director  
*Jeffrey M. Rosa*

TO: Members of the Athletic Trainers Section

FROM: Jeffrey M. Rosa, Executive Director

DATE: May 1, 2014

RE: Executive Director's Report

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In addition to an account of my activities since the March Joint Board and Section meetings, attached to this report is a copy of the budget update and the legislative update.

### Legislative

Attached to this memo is a status report of relevant legislation from the 130<sup>th</sup> General Assembly as of May 1, 2014.

### Board Management

- Reviewed the minutes for the March Section meetings.
- Reviewed OT, PT, and AT correspondence and licensure applications.
- On May 5, reconciled revenues with Diane Moore.
- On April 24, attended the Ohio Boards and Commissions Management meeting.
- On April 29, attended an e-license 2.0 steering committee meeting.
- On April 11, attended an e-license 2.0 stakeholders meeting.
- On March 12, 25-28, with Diane Moore, worked with Iron Data staff regarding configuration for the new licensing system.
- On April 7-10, with Diane Moore, attended letters training for the new licensing system.
- On April 28, attended the JCARR meeting covering the Board's no change rules.
- March OT correspondence was sent on March 17, 2014.
- March PT correspondence was sent on March 17, 2014.
- There was no AT correspondence in March.
- March Joint correspondence was sent on March 17, 2014.

### Fiscal Responsibility

The attached report reflects the expenditures and revenues that occurred during FY 2014 through April 30, 2014 (with the following exceptions):

- Payments made during this fiscal year using last year's (FY 2013) encumbered funds;
- Funds encumbered in FY 2014 via purchase order, pending payment.

### *Report Legend*

- **Actual Spent** – The total amount spent for each of the subcategories for the particular expense category (e.g.: 500, 520, etc.) at the time of reporting, with the above exceptions.
- **Allotment** – The amount allocated for the expense category. This figure may be adjusted during the fiscal year if allotments are increased (e.g.: controlling board request to increase appropriation authority) or if allotments are transferred between expense categories.
- **Amount Remaining** – The amount remaining in the expense category at the time of the report. This figure is obtained by subtracting the actual spent from the allotment.

- **% Spent** – Reflects the percentage of funds used for each expense category from that category's allotment. For the Section specific reports, the % of Total category indicates the percentage of total agency spending in that category that is attributable to the Section.

### *FY 2014 Report Summary*

As of April 30, 2014, 304 days elapsed in the fiscal year (83.3%).

- *Staff Payroll* – The Board spent approximately 84% of its funds allocated to staff payroll.
- *Personal Services* – The main expenditures to date in this category are testing accommodations for the Ohio Physical Therapy Jurisprudence Exam and two PT Section hearings. Year to date, the Board has already spent more in this category than allotted for the entire fiscal year.
- *Maintenance* – The Board spent 71% in this category. The main expenditures in this category include rent, mail, Central Service Agency fees, credit card processing fees, and IT services. In April, the Board received the rent invoices for the first three quarters of the fiscal year. Rent rates increased by about 20% over what was budgeted. This is causing some concern as we near the end of the fiscal year. The Board budgeted \$8.51/sq. ft. Actual rates are \$10.51/sq. ft. For the entire year, this will be about \$8,500 more than budgeted.
- *Equipment* – The only expense in this category is the new computers.
- *Board Payroll* – The Board spent approximately 69% of its funds allocated to Board member payroll.
- *Board Travel & Maintenance* – The Board spent 106% of the funds allocated for this category. A main reason for the overspending in this category is the increase in mileage reimbursement rates.
- *Refunds* – The Board has not spent anything in this category, which is used to pay for refunds to licensees who render incorrect or duplicate payments.

### **Networking and Relationship Building**

- None since March meetings.

### **Leadership for Office Staff**

- None since March meetings.

### **Communications/Customer Satisfaction**

- As of May 1, 2014, 1,510 individuals “liked” the Board’s Facebook page, an increase of 4.2% since February 25, 2014.
- As of May 1, 2014, 639 individuals followed the Board’s Twitter feed, an increase of 7.8% since February 25, 2014.

### **Professional Development Objectives**

- On March 11, presented to the Illinois PT Board in Springfield, IL.
- On March 18-24, attended the Federation of State Boards of Physical Therapy Board of Directors meeting in Santa Barbara, CA.
- On April 10, attended a WebEx covering what occurs at the Prometric Test Center on NPTE test day.
- On April 26-27, attended the Federation of State Boards of Physical Therapy Licensure Compact Advisory Task Force in Alexandria, VA.

### **Presentations**

- Ohio Physical Therapy Association Annual Membership Meeting (March 29)
- OT students at Xavier University (April 4)
- OOTA Columbus District (April 16)
- OT students at Ohio State University (April 21)
- OOTA Northeast and North Central Districts (May 3)

**License Census**

The following table lists the number of individuals licensed by the Board as of May 1, 2014.

	As of 5/1/14
OT	5,067
OT Escrow	121
OT Limited	7
OTA	3,996
OTA Escrow	89
OTA Limited	4
PT	8,364
PTA	7,043
AT	2,459
<b>TOTAL</b>	<b>27,150</b>

**License Review Metrics**

Attached to this memo is the license review metrics for applications approved through April 30, 2014.

## Status Report of Legislation from the 130th General Assembly

Prepared by: Jeff Rosa

Report created on May 1, 2014

### **HB83**     **PSYCHOLOGY LAWS** (HACKETT R) To revise the laws governing the practice of psychology.

*Current Status:* 12/19/2013 - **SIGNED BY GOVERNOR**; Eff. 3/20/2014

*All Bill Status:* 12/4/2013 - **PASSED BY SENATE**; Vote 33-0  
4/17/2013 - **PASSED BY HOUSE**; Vote 96-1  
2/26/2013 - Introduced

*Comments:* Under the OT Practice Act (ORC 4755.13 (B)), OTs are prohibited from using any "psychological procedures defined by the state board of psychology under division (C) of section 4732.23 of the Revised Code as a serious hazard to mental health and to require professional expertise in psychology." This bill deletes that paragraph. In addition, an amendment to the exemptions to psychology licensure (ORC 4732.22) state that "persons licensed, certified, or registered under any other provision of the Revised Code who are practicing those arts and utilizing psychological procedures that are allowed within the standards and ethics of their profession or within new areas of practice that represent appropriate extensions of their profession, provided that they do not hold themselves out to the public by the title of psychologist" (division (A)(8) of RC. 4732.22).

*ORC Sections:* 102.02, 102.022, 102.03, 2152.54, 2919.271, 2945.37, 4732.01, 4732.02, 4732.03, 4732.06, 4732.07, 4732.09, 4732.10, 4732.11, 4732.12, 4732.13, 4732.14, 4732.141, 4732.15, 4732.16, 4732.17, 4732.171, 4732.172, 4732.173, 4732.18, 4732.21, 4732.22, 4732.31, 4755.13, 4757.42, 5120.55, 5122.01

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_83](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_83)

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### **HB98**     **OCCUPATIONAL LICENSING LAW** (GONZALES A, RETHERFORD W) To revise the Occupational Licensing Law regarding military service members and veterans.

*Current Status:* 11/15/2013 - **SIGNED BY GOVERNOR**; Eff. 11/15/2013

*All Bill Status:* 11/6/2013 - **PASSED BY SENATE**; Amended on Floor --  
Emergency Clause Vote 30-3 -- Bill Vote 33-0  
5/22/2013 - **PASSED BY HOUSE**; Emergency Vote 92-1 Bill Vote 93-0  
3/7/2013 - Introduced

*Comments:* The bill requires all licensing agencies to consider military training when determining eligibility for licensure. The enacted law requires agencies to adopt rules by June 30, 2014, to specify which military programs of training, primary specialties, and lengths of service are substantially equivalent to the educational/experience requirements for licensure. The bill does not require the Board to automatically license individuals based on military training, but rather to determine if training is substantially equivalent.

*ORC Sections:* 4506.09, 4713.60, 4723.24, 4725.16, 4725.51, 4732.14, 4733.15, 4743.04, 5903.03, 5903.10, 5903.12, 5903.121

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_98](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_98)

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### **HB123**     **TELEHEALTH SERVICES** (GONZALES A, WACHTMANN L) Regarding Medicaid and health insurance coverage of telehealth services.

*Current Status:* 2/18/2014 - **SIGNED BY GOVERNOR**; Eff. 5/20/2014

**All Bill Status:** 1/29/2014 - **PASSED BY SENATE**; Vote 30-0  
6/26/2013 - **PASSED BY HOUSE**; Vote 95-3  
4/10/2013 - Introduced

**Comments:** Under the bill, the Department of Medicaid is required to establish standards for Medicaid payments for health care services the Department determines are appropriate to be covered by Medicaid when provided as telehealth services. The bill defines a telehealth services as "a health care service delivered to a patient through the use of interactive audio, video, or other telecommunications or electronic technology from a site other than the site where the patient is located."

**ORC Sections:** 2305.25, 2305.252, 5164.94

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_123](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_123)

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**HB130**    **END DEMAND ACT-HUMAN TRAFFICKING (FEDOR T)** To authorize a judge or magistrate to order the testimony of a victim of trafficking in persons to be taken by closed circuit television equipment under certain circumstances, to prohibit the release of routine police reports that contain identifying information about minor crime victims or uncharged arrestees unless the identifying information is redacted, to specify that a public children services agency or private child placement agency is not required to make reasonable efforts to prevent the removal of a child from the child's home, eliminate the continued removal of a child from the child's home, or return a child to the child's home and that a court find that a child cannot be placed with either parent under specified circumstances, to provide that a guardian ad litem can be appointed for a child in certain situations, to extend the period within which a prosecution for trafficking in persons must be commenced from six to twenty years after the offense is committed, to specify that the Rape Shield Law applies to evidence of a rape victim's involuntary sexual activity as well as evidence of a rape victim's voluntary sexual activity, to prohibit the admission of evidence pertaining to a victim's sexual activity in a case of trafficking in persons in the same manner as the Rape Shield Law does in a case of rape, to eliminate as an element of the offense of importuning the offender's knowledge or reckless disregard of the age of the person importuned when the person importuned is a victim of trafficking in persons who is 16 or 17 years of age, to provide that if a minor is a victim of trafficking in persons or human trafficking the state does not need to prove that the minor was compelled to engage in certain specified activities, to include in the offense of promoting prostitution certain specified activities that through electronic means promotes or facilitates sexual activity for hire, to increase the penalty for soliciting when the person solicited is a minor, to require offenders convicted of solicitation when the person solicited is under 18 years of age to register as sex offenders, to prohibit including the term "massage" or any other term that implies a massage technique or method in advertisements unless certain circumstances apply, and to declare an emergency.

**Current Status:** 2/25/2014 - Senate Criminal Justice, (Second Hearing)

**All Bill Status:** 6/26/2013 - **PASSED BY HOUSE**; Bill Amended Bill Vote 98-0  
Emergency Clause Vote 98-0  
4/16/2013 - Introduced

**Comments:** One section of the bill states:

"No person shall advertise the practice of massage or any other term that implies a massage technique or method, including relaxation massage, in any public publication or communication unless the person is a practitioner of medicine or surgery, or any of its branches, including massage therapy, and has the appropriate certificate from the state medical board, the person is a chiropractor licensed by the state chiropractic board, the person is a cosmetologist, esthetician, or manicurist licensed by the state board of cosmetology, or the person is licensed, certified, or regulated by a political

subdivision to engage in massage."

The bill was amended to allow any individual licensed under Title 47 (includes OT, PT, & AT) to advertise for massage if their professional license authorizes the individual to practice massage or a massage technique or method.

**ORC Sections:** 109.54, 149.435, 2151.414, 2151.419, 2901.13, 2905.32, 2907.02, 2907.05, 2907.07, 2907.19, 2907.22, 2907.24, 2907.241, 2907.25, 2927.17, 2929.01, 2937.11, 2950.01, 2951.041

**State Bill Page:** <http://www.legislature.state.oh.us/bills.cfm?ID=130> HB 130

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**HB180**     **CARDIAC ARREST-YOUTH ACTIVITIES** (PILLICH C) With regard to sudden cardiac arrest in youth athletic activities.

**Current Status:** 6/19/2013 - House Health and Aging, (First Hearing)

**All Bill Status:** 5/28/2013 - Introduced

**Comments:** The bill requires a student-athlete's coach to remove the student-athlete from participation in an athletic activity if any of the following determine that the student exhibits signs/symptoms of sudden cardiac arrest:

(a) Game official; (b) Coach; (c) Athletic trainer; (d) Physician; or (e) Any other official designated by a school.

If a student-athlete is removed, they cannot return to participation until they are evaluated and cleared to return by one of the following:

(a) Physician; or (b) Certified nurse practitioner, clinical nurse specialist, or certified nurse-midwife.

**ORC Sections:** 3313.5310, 3314.03, 3326.11, 3707.56, 3707.57

**State Bill Page:** <http://www.legislature.state.oh.us/bills.cfm?ID=130> HB 180

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**HB220**     **PHYSICAL THERAPIST PRACTICE** (HOOD R) To modify the scope of practice of a physical therapist.

**Current Status:** 3/25/2014 - House Health and Aging, (Second Hearing)

**All Bill Status:** 6/25/2013 - Introduced

**Comments:** This is a bill backed by the Ohio Physical Therapy Association. The bill modifies the physical therapy scope of practice (ORC 4755.40) to read:

(A)(1) "Physical therapy" means all of the following, for the purpose of preventing, correcting, or alleviating physical impairments, functional limitations, or any disability:

(a) The evaluation of a person to determine a diagnosis of physical impairment, functional limitations, or disability, to determine a prognosis, and to determine a plan of therapeutic intervention;

(b) The treatment of a person by physical measures, which include massage, heat, cold, air, light, water, electricity, sound, manual therapy techniques, and the performance of tests of neuromuscular function as an aid to such treatment;

(c) The use of therapeutic exercises and rehabilitative procedures, with or without assistive devices.

(2) If performed by a person who is adequately trained, physical therapy includes all of the following:

(a) The design, fabrication, revision, education, and instruction in the use of various assistive devices including braces, splints, ambulatory or locomotion devices, wheelchairs, prosthetics, and orthotics;

(b) The administration of topical drugs that have been prescribed by a licensed health professional authorized to prescribe drugs, as defined in section 4729.01 of the Revised Code;

(c) The establishment and modification of physical therapy programs, treatment planning, patient education and instruction, and consultative services;

(d) Physiotherapy;

(e) Ordering appropriate tests, including diagnostic imaging and studies, that are performed and interpreted by other licensed health care professions.

(3) Physical therapy does not include the use of Roentgen rays or radium for diagnostic or therapeutic purposes, or the use of electricity for cauterization or other surgical purposes.

Existing paragraphs (B), (C), and (D) are not amended in this bill.

**ORC Sections:** 4755.40

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_220](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_220)

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**HB232 SOCIAL WORKERS-THERAPISTS LAWS (SEARS B, MILKOVICH Z)** To modify the laws governing professional counselors, social workers, and marriage and family therapists.

**Current Status:** 4/10/2014 - **SIGNED BY GOVERNOR**

**All Bill Status:** 4/2/2014 - **PASSED BY SENATE**; Vote 31-0  
11/6/2013 - **PASSED BY HOUSE**; Vote 74-23  
7/17/2013 - Introduced

**Comments:** The bill was amended on the House floor to add language authorizing occupational therapists to form corporations and limited liability companies to provide professional services in conjunction with a variety of other health care professionals. This language, which was requested by the Ohio Occupational Therapy Association, mirrors language that already exists for physical therapists.

The bill was also amended to add athletic trainers to the definition of "health care professional." The statutory definition already included OT, OTA, PT, and PTA.

**ORC Sections:** 1701.03, 1705.03, 1705.04, 1705.53, 1785.01, 1785.02, 1785.03, 2152.72, 2305.234, 2305.51, 2317.02, 2921.22, 2925.01, 2951.041, 3107.014, 3701.046, 3701.74, 3709.161, 3721.21, 3923.28, 3923.281, 3923.282, 3923.29, 3923.30, 3963.01, 4723.16, 4725.33, 4729.161, 4731.226, 4731.65, 4732.28, 4734.17, 4734.41, 4755.111, 4755.471, 4757.01, 4757.02, 4757.03, 4757.04, 4757.10, 4757.11, 4757.13, 4757.16, 4757.21, 4757.22, 4757.23, 4757.26, 4757.27, 4757.28, 4757.29, 4757.30, 4757.31, 4757.321, 4757.33,

4757.34, 4757.36, 4757.37, 4757.38, 4757.41, 4757.43, 4758.40, 4758.41, 4758.55, 4758.561, 4758.59, 4758.61, 4769.01, 5101.61, 5123.61

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_232](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_232)

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**HB296**     **SCHOOLS-EPINEPHRINE AUTOINJECTORS** (JOHNSON T, DUFFEY M) To permit public schools to procure epinephrine autoinjectors in accordance with prescribed procedures and to exempt them from licensing requirements related to the possession of epinephrine autoinjectors.

*Current Status:* 4/21/2014 - **SIGNED BY GOVERNOR**

*All Bill Status:* 4/8/2014 - **PASSED BY SENATE**; Emergency Clause Vote 32-0 Bill Vote 32-0

11/20/2013 - **PASSED BY HOUSE**; Vote 92-0

10/10/2013 - Introduced

*Comments:* Existing state law allows local boards of education to designate employees who are authorized to administer to a student a drug prescribed for the student. The bill allows school districts to procure epinephrine autoinjectors to have on premises for use in emergency situations. It appears that the bill exempts the district from the requirement to obtain a Terminal Distributor of Dangerous Drugs license from the Pharmacy Board only for the emergency epi-pens.

Under the bill, any district that elects to procure the emergency epi-pens must specify district employees, in addition to the school nurse, who may access and use the epi-pen in an emergency situation. This language would allow an athletic trainer who is identified by the district to administer the epi-pen in an emergency situation.

The Ohio Athletic Trainers Association successfully asked that the language be amended to permit licensed AT's who contract with the school and/or district, to also be able to administer the epi-pen, since the bill currently is limited to district employees.

*ORC Sections:* 3313.7110, 3313.7111, 3313.713, 3313.718, 3314.143, 3326.28, 3328.29, 4729.51, 4729.60, 5101.76

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_296](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_296)

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**HB317**     **MEDICAID REFORM MEASURES** (SEARS B) Regarding reforms relating to Medicaid, fraud committed against the state, penalties for certain drug offenses committed against pregnant women, non-opiate medication for released inmates, prescription-related identification requirements, and education for individuals without a high school diploma.

*Current Status:* 10/30/2013 - House Health and Aging, (First Hearing)

*All Bill Status:* 10/24/2013 - Introduced

*ORC Sections:* 103.41, 103.411, 103.412, 2747.01, 2747.02, 2747.03, 2747.04, 2747.05, 2747.06, 2747.07, 2747.08, 2747.09, 2925.02, 2925.03, 3313.617, 4729.553, 5120.113, 5162.01, 5162.133, 5162.70, 5163.04

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_317](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_317)

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**HB398**     **STUDY COMMITTEES CREATION** (SEARS B) To create the Veterans and Medicaid Eligibility Study Committee and the Health Care Access and Innovation Study Committee.

*Current Status:* 1/14/2014 - Referred to Committee House Health and Aging

*All Bill Status:* 12/23/2013 - Introduced  
*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_398](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_398)

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**HB488**     **MBR-HIGHER EDUCATION-MILITARY VETERANS** (DOVILLA, LANDIS) To require state institutions of higher education to award credit for military training, and to make other changes regarding state support and benefits for veterans and their spouses.

*Current Status:* 4/9/2014 – **PASSED BY HOUSE**; Vote 92-0

*All Bill Status:* 3/18/2014 - Introduced

*Comments:* This bill codifies many of the provisions contained in the Governor's Executive Order. Although the bill has not yet passed, significant portions of the Board's "HB 98" rules are based on language contained in this bill.

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_488](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_488)

**HB531**     **MEDICAL PROFESSIONALS-CONTINUING EDUCATION REQUIREMENTS** (GONZALES A) To authorize the State Medical Board to fine certain professionals it regulates for failing to comply with continuing education requirements without suspending the individual's license or certificate to practice, to authorize the Board to fine the professionals it regulates for violating law administered by the Board, and to impose additional terms and conditions for physician certificate restoration.

*Current Status:* 4/30/2014 - Introduced

*ORC Sections:* 4730.14, 4730.252, 4731.22, 4731.222, 4731.225, 4731.281, 4760.133, 4762.133, 4774.133, 4778.06, 4778.141

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_HB\\_531](http://www.legislature.state.oh.us/bills.cfm?ID=130_HB_531)

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**SB3**     **RULE-MAKING REFORM** (LAROSE F) To reform rule-making and rule-review procedures and regulatory processes.

*Current Status:* 4/8/2014 - **BILL AMENDED**, House State and Local Government, (Third Hearing)

*All Bill Status:* 6/26/2013 - **PASSED BY SENATE**; Vote 32-0  
2/12/2013 - Introduced

*Comments:* The bill clarifies that existing rules being filed in accordance with the no change provisions must go through the Common Sense Initiative process. The bill also requires JCARR to establish, maintain, and improve an electronic rule watch system. The bill also requires agencies to prepare a report at the conclusion of the public rules hearing outlining a summary of the positions, arguments, or contentions, and of the issues raised at the hearing. This hearing summary report is required to be filed with JCARR before an agency can final file any rule.

New section 113.091 is included in the bill. This language states that if an agency imposes a fine as punishment for an act or omission, any moneys collected shall be deposited into the GRF.

*ORC Sections:* 101.35, 103.0511, 107.52, 107.53, 107.54, 107.55, 107.62, 107.63, 111.15, 117.20, 119.01, 119.03, 119.04, 121.39, 121.73, 121.74, 121.81, 121.811, 121.82, 121.83, 121.91, 126.02, 127.18, 1531.08, 3319.22, 3319.221, 3333.021, 3333.048, 3701.34, 3737.88, 3746.04, 4117.02, 4141.14, 5103.0325, 5117.02, 5703.14, 6111.31, 6111.51

*State Bill Page:* [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_3](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_3)

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**SB13 VETERANS-ACADEMIC CREDIT (GENTILE L)** To enhance support and services for veterans at state institutions of higher education and to require each institution to develop a policy for awarding academic credit to veterans for training received while in the military.

**Current Status:** 1/15/2014 - **BILL AMENDED**, Senate Public Safety, Local Government and Veterans Affairs, (Third Hearing)

**All Bill Status:** 2/12/2013 - Introduced

**Comments:** The bill requires state colleges and universities to award academic credit that meets the standards of the American Council on Education or equivalent standards for awarding academic credit to a student veteran for training or service completed by the student veteran as a member of the armed forces.

**ORC Sections:** 3333.0412, 5903.05, 5907.071

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_13](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_13)

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**SB93 OPEN MEETINGS ACT (JONES S)** To require that further information be stated in motions to hold executive sessions under the Open Meetings Act, to expand the fees and expenses that may be recovered for violations of the Act, and to make other changes to the Act.

**Current Status:** 1/22/2014 - Senate State Government Oversight and Reform, (First Hearing)

**All Bill Status:** 3/21/2013 - Introduced

**ORC Sections:** 121.22

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_93](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_93)

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**SB131 HEALTH CARE PROFESSIONAL REQUIREMENT (TAVARES C)** To require certain health care professionals to complete instruction in cultural competency.

**Current Status:** 5/22/2013 - Referred to Committee Senate Medicaid, Health and Human Services

**All Bill Status:** 5/15/2013 - Introduced

**Comments:** The bill requires applicants for initial and renewed licensure in specified professions to complete instruction/continuing education in cultural competency.

The impacted professions are dentistry, optometry, pharmacy, psychology, medicine, social worker, counselor, marriage and family therapy, and nursing.

**ORC Sections:** 4743.08

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_131](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_131)

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**SB132 HEALTH CARE PROFESSIONAL LICENSE DISPLAY (TAVARES C)** To require certain health care professionals to wear, when providing direct patient care, an identification card, badge, or similar device that includes a photograph of the professional and specifies the license held by the professional.

**Current Status:** 5/22/2013 - Referred to Committee Senate Medicaid, Health and Human Services

**All Bill Status:** 5/15/2013 - Introduced

**Comments:** The bill enacts ORC 4745.04 to require health care professionals to, at all times when providing direct patient care, wear an identification card, badge, or similar device that includes a recent photograph, the individual's name, the license held, and the expiration date of the license.

The bill also states that failure to wear the identification card would be grounds for disciplinary action. The Board's licensees are included in this bill.

**ORC Sections:** 4715.30, 4723.28, 4725.19, 4725.53, 4729.16, 4730.02, 4730.25, 4731.22, 4732.17, 4734.31, 4745.04, 4753.10, 4755.11, 4755.47, 4755.64, 4757.36, 4758.30, 4759.07, 4760.13, 4761.09, 4762.13, 4765.33, 4773.03, 4774.13, 4778.14, 4779.28

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_132](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_132)

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**SB151 OHIO HEALTH CARE PROFESSIONAL LOAN REPAYMENT PROGRAM (TAVARES C)** To require the Director of Health to establish the Ohio Health Care Professional Loan Repayment Program.

**Current Status:** 6/26/2013 - Referred to Committee Senate Medicaid, Health and Human Services

**All Bill Status:** 6/25/2013 - Introduced

**Comments:** The bill creates the Ohio Health Care Professional Loan Repayment Program to provide grants to specified primary health care professionals to assist in the repayment of qualifying educational loans. The health care professions included in the bill are:

(A) Physicians; (B) Physician assistants; (C) Certified nurse practitioners who practice a primary care specialty; (D) Certified nurse-midwives; (E) Clinical nurse specialist who specializes in psychiatric or mental health services; (F) Dentists who practice a primary care specialty; (G) Dental hygienists; (H) Independent marriage and family therapists; (I) Professional clinical counselors; (J) Licensed independent social workers; and (K) Psychologists who have passed the examination for professional practice of psychology.

**ORC Sections:** 4783.01, 4783.02, 4783.03, 4783.04, 4783.05, 4783.06, 4783.07, 4783.08, 4783.09

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_151](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_151)

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**SB264 SCHOOLS- OCCUPATIONAL-PHYSICAL THERAPISTS WORKLOADS (SCHAFFER T)** To require the Department of Education to solicit from school districts and educational service centers regular studies of the time spent by occupational and physical therapists on certain activities and to use the studies to determine appropriate workloads.

**Current Status:** 1/22/2014 - Referred to Committee Senate Education

**All Bill Status:** 1/14/2014 - Introduced

**ORC Sections:** 3323.21

**State Bill Page:** [http://www.legislature.state.oh.us/bills.cfm?ID=130\\_SB\\_264](http://www.legislature.state.oh.us/bills.cfm?ID=130_SB_264)

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# Ohio OTPTAT Board - FY 2014 Budget Report

<b>Revenue</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>
OT Non-Renewal Income	\$26,880.00	\$14,890.00	\$21,100.00	\$7,890.00	\$70,760.00
OT Renewal Income	\$66,740.00	\$0.00	\$0.00	\$0.00	\$66,740.00
OTA Renewal Income	\$0.00	\$0.00	\$0.00	\$14,660.00	\$14,660.00
PT Non-Renewal Income	\$28,105.00	\$28,625.00	\$41,310.00	\$19,900.00	\$117,940.00
PT Renewal Income	\$0.00	\$276,150.00	\$295,750.00	(\$70.00)	\$571,830.00
PTA Renewal Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AT Non-Renewal Income	\$12,340.00	\$3,330.00	\$3,650.00	\$2,715.00	\$22,035.00
AT Renewal Income	\$0.00	\$100.00	(\$100.00)	\$0.00	\$0.00
Disciplinary Fines	\$1,100.00	\$1,200.00	\$1,750.00	\$1,300.00	\$5,350.00
Income from Other Sources	\$210.00	\$205.00	\$0.00	\$0.00	\$415.00
<b>Revenue Total</b>	<b>\$135,375.00</b>	<b>\$324,500.00</b>	<b>\$363,460.00</b>	<b>\$46,395.00</b>	<b>\$869,730.00</b>

<b>Staff Payroll (500)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$100,460.18	\$89,173.36	\$100,131.35	\$31,192.04	\$320,956.93	
Salaries - OT Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Paid Leave & Othr Compensation	\$16,794.46	\$14,864.33	\$21,930.36	\$3,711.97	\$57,301.12	
Other Employer-Paid Benefits	\$47,066.93	\$42,888.51	\$49,681.41	\$14,312.56	\$153,949.41	
DAS Payroll Charges	\$2,375.45	\$2,191.35	\$2,482.65	\$711.25	\$7,760.70	
<b>Actual Spent</b>	<b>\$166,697.02</b>	<b>\$149,117.55</b>	<b>\$174,225.77</b>	<b>\$49,927.82</b>	<b>\$539,968.16</b>	
<i>Allotment</i>	\$166,697.02	\$149,117.55	\$177,361.00	\$152,023.00	\$645,198.57	
<i>Amount Remaining</i>	\$0.00	\$0.00	\$3,135.23	\$102,095.18	\$105,230.41	% Spent
<b>Total Staff Payroll</b>	<b>\$166,697.02</b>	<b>\$149,117.55</b>	<b>\$174,225.77</b>	<b>\$49,927.82</b>	<b>\$539,968.16</b>	<b>84%</b>

<b>Personal Services (510)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Hearing Officers	\$3,244.25	\$0.00	\$0.00	\$0.00	\$3,244.25	
Court Reporters	\$1,716.60	\$0.00	\$0.00	\$0.00	\$1,716.60	
Subpoena & Witness Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Conference Registration Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Dues, Subscriptions, ADA, Misc	\$910.00	\$2,715.00	\$1,470.00	\$240.00	\$5,335.00	
<b>Actual Spent</b>	<b>\$5,870.85</b>	<b>\$2,715.00</b>	<b>\$1,470.00</b>	<b>\$240.00</b>	<b>\$10,295.85</b>	
<i>Allotment</i>					\$15,000.00	
<i>Amount Remaining</i>					\$4,704.15	% Spent
<b>Total Personal Services</b>	<b>\$5,870.85</b>	<b>\$2,715.00</b>	<b>\$1,470.00</b>	<b>\$240.00</b>	<b>\$10,295.85</b>	<b>69%</b>

<b>Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>
Office Supplies	\$1,946.45	\$533.41	\$1,113.04	\$796.00	\$4,388.90
Credit Card Processing Fees	\$295.26	\$2,335.17	\$8,042.79	\$408.39	\$11,081.61
Parking	\$90.00	\$360.00	\$270.00	\$90.00	\$810.00
Staff Travel - In State	\$0.00	\$448.12	\$261.04	\$104.00	\$813.16
Staff Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
VoIP & Toll-free Telephone	\$0.20	\$194.41	\$476.40	\$155.04	\$826.05
FedEx/UPS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Document Shredding	\$50.00	\$80.60	\$75.00	\$25.00	\$230.60
Ofc. Equip. Maint. & Repairs	\$0.00	\$0.00	\$2,025.88	\$0.00	\$2,025.88
Printing/Copying	\$0.00	\$3,867.35	\$883.40	\$715.50	\$5,466.25
Legal Notices in Newspapers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Rent (+space repairs, improve)	\$0.00	\$0.00	\$0.00	\$31,953.90	\$31,953.90
Central Service Agency	\$7,951.53	\$5,971.82	\$8,163.96	\$8,717.21	\$30,804.52
Telephone (DAS)	\$440.01	\$1,778.74	\$175.00	\$0.00	\$2,393.75

DAS Motor Pool	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
State Purchasing Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
DAS Centralized Mail Service	\$0.00	\$1,619.16	\$1,785.44	\$0.00	\$3,404.60	
DAS IT Services	\$1,360.28	\$4,117.62	\$10,425.58	\$1,292.69	\$17,196.17	
Other	\$384.00	\$995.32	\$109.00	\$1.79	\$1,490.11	
<b>Actual Spent</b>	\$12,517.73	\$22,301.72	\$33,806.53	\$44,259.52	\$112,885.50	
<i>Allotment</i>					\$159,269.35	
<i>Amount Remaining</i>					\$46,383.85	% Spent
<b>Total Maintenance Cost</b>	\$12,517.73	\$22,301.72	\$33,806.53	\$44,259.52	\$112,885.50	71%

<b>Equipment (530)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Computer / IT Purchases	\$0.00	\$0.00	\$5,202.00	\$0.00	\$5,202.00	
All other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$0.00	\$0.00	\$5,202.00	\$0.00	\$5,202.00	
<i>Allotment</i>					\$9,000.00	
<i>Amount Remaining</i>					\$3,798.00	% Spent
<b>Total Equipment Cost</b>	\$0.00	\$0.00	\$5,202.00	\$0.00	\$5,202.00	58%

<b>Bd Member Payroll</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$5,556.21	\$3,296.27	\$3,826.07	\$584.58	\$13,263.13	
Other Employer-Paid Benefits	\$863.74	\$512.45	\$594.81	\$90.91	\$2,061.91	
DAS Payroll Charges	\$596.91	\$311.50	\$536.43	\$110.09	\$1,554.93	
<b>Actual Spent</b>	\$7,016.86	\$4,120.22	\$4,957.31	\$785.58	\$16,879.97	
<i>Allotment</i>	\$7,016.86	\$4,120.22	\$8,924.00	\$4,462.00	\$24,523.08	
<i>Amount Remaining</i>	\$0.00	\$0.00	\$3,966.69	\$3,676.42	\$7,643.11	% Spent
<b>Total Board Payroll</b>	\$7,016.86	\$4,120.22	\$4,957.31	\$785.58	\$16,879.97	69%

<b>Board Travel &amp; Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Board Travel - In State	\$3,882.00	\$3,355.88	\$4,036.78	\$153.60	\$11,428.26	
Board Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Misc. Expenses (non-travel)	\$60.00	\$774.25	\$1,530.75	\$0.00	\$2,365.00	
Conference Registrations (510)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$3,942.00	\$4,130.13	\$5,567.53	\$153.60	\$13,793.26	
<i>Allotment</i>					\$12,977.00	
<i>Amount Remaining</i>					(\$816.26)	% Spent
<b>Total Board Maintenance</b>	\$3,942.00	\$4,130.13	\$5,567.53	\$153.60	\$13,793.26	106%

<b>Refunds (595)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
<b>Actual Spent</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<i>Allotment</i>					\$200.00	
<i>Amount Remaining</i>					\$200.00	% Spent
<b>Total Refunds</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% Spent</b>
<b>OPERATIONAL COSTS TOTAL</b>	\$196,044.46	\$182,384.62	\$225,229.14	\$95,366.52	\$699,024.74	81%

<b>TOTAL REVENUE</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>
	\$135,375.00	\$324,500.00	\$363,460.00	\$46,395.00	\$869,730.00

April 30, 2014 is 83.3% of FY 2014  
Day 304 of 365 days in FY 2014

FY 14 Appropriation Authority \$866,169  
Amount Unspent \$167,144.26

## OT Section - Budget Report FY 2014

<b>Revenue</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>
OT Non-Renewal Income	\$26,880.00	\$14,890.00	\$21,100.00	\$7,890.00	\$70,760.00
OT Renewal Income	\$66,740.00	\$0.00	\$0.00	\$0.00	\$66,740.00
OTA Renewal Income	\$0.00	\$0.00	\$0.00	\$14,660.00	\$14,660.00
PT Non-Renewal Income	\$28,105.00	\$28,625.00	\$41,310.00	\$19,900.00	\$117,940.00
PT Renewal Income	\$0.00	\$276,150.00	\$295,750.00	(\$70.00)	\$571,830.00
PTA Renewal Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AT Non-Renewal Income	\$12,340.00	\$3,330.00	\$3,650.00	\$2,715.00	\$22,035.00
AT Renewal Income	\$0.00	\$100.00	(\$100.00)	\$0.00	\$0.00
Disciplinary Fines	\$1,100.00	\$1,200.00	\$1,750.00	\$1,300.00	\$5,350.00
Income from Other Sources	\$210.00	\$205.00	\$0.00	\$0.00	\$415.00
<b>Revenue Total</b>	<b>\$135,375.00</b>	<b>\$324,500.00</b>	<b>\$363,460.00</b>	<b>\$46,395.00</b>	<b>\$869,730.00</b>

<b>Staff Payroll (500)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$33,422.16	\$29,671.53	\$33,301.45	\$10,384.83	\$106,779.97	
Salaries - OT Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Paid Leave & Othr Compensati	\$5,607.57	\$4,949.75	\$7,320.10	\$1,231.32	\$19,108.74	
Other Employer-Paid Benefits	\$15,696.45	\$14,295.61	\$16,560.49	\$4,770.83	\$51,323.38	
DAS Payroll Charges	\$790.90	\$729.50	\$826.49	\$236.87	\$2,583.76	
<b>Actual Spent</b>	<b>\$55,517.08</b>	<b>\$49,646.39</b>	<b>\$58,008.53</b>	<b>\$16,623.85</b>	<b>\$179,795.85</b>	<b>% of Total</b>
<b>Total Staff Payroll</b>	<b>\$166,697.02</b>	<b>\$149,117.55</b>	<b>\$174,225.77</b>	<b>\$49,927.82</b>	<b>\$539,968.16</b>	<b>33%</b>

<b>Personal Services (510)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Hearing Officers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Court Reporters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Subpoena & Witness Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Conference Registration Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Dues, Subscriptions, ADA, Misc	\$216.00	\$0.00	\$346.50	\$81.60	\$644.10	
<b>Actual Spent</b>	<b>\$216.00</b>	<b>\$0.00</b>	<b>\$346.50</b>	<b>\$81.60</b>	<b>\$644.10</b>	<b>% of Total</b>
<b>Total Personal Services</b>	<b>\$5,870.85</b>	<b>\$2,715.00</b>	<b>\$1,470.00</b>	<b>\$240.00</b>	<b>\$10,295.85</b>	<b>6%</b>

<b>Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Office Supplies	\$642.33	\$176.01	\$367.30	\$262.68	\$1,448.32	
Credit Card Processing Fees	\$268.13	\$185.99	\$151.50	\$29.89	\$635.51	
Parking	\$29.70	\$118.80	\$89.10	\$29.70	\$267.30	
Staff Travel - In State	\$0.00	\$367.00	\$110.24	\$104.00	\$581.24	
Staff Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
VoIP & Toll-free Telephone	\$0.06	\$64.15	\$157.21	\$51.13	\$272.55	
FedEx/UPS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Document Shredding	\$16.50	\$26.60	\$24.75	\$8.25	\$76.10	
Ofc. Equip. Maint. & Repairs	\$0.00	\$0.00	\$668.54	\$0.00	\$668.54	
Printing/Copying	\$0.00	\$907.11	\$0.69	\$236.12	\$1,143.92	
Legal Notices in Newspapers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Rent (+space repairs, improve)	\$0.00	\$0.00	\$0.00	\$10,544.79	\$10,544.79	
Central Service Agency	\$2,703.52	\$1,970.70	\$2,694.10	\$2,876.68	\$10,245.00	
Telephone (DAS)	\$149.60	\$586.98	\$57.75	\$0.00	\$794.33	
DAS Motor Pool	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
State Purchasing Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
DAS Centralized Mail Service	\$0.00	\$534.32	\$589.20	\$0.00	\$1,123.52	
DAS IT Services	\$448.89	\$1,358.82	\$3,440.46	\$426.59	\$5,674.76	
Other	\$126.11	\$194.06	\$56.55	\$1.79	\$378.51	
<b>Actual Spent</b>	<b>\$4,384.84</b>	<b>\$6,490.54</b>	<b>\$8,407.39</b>	<b>\$14,571.62</b>	<b>\$33,854.39</b>	<b>% of Total</b>
<b>Total Maintenance Cost</b>	<b>\$12,517.73</b>	<b>\$22,301.72</b>	<b>\$33,806.53</b>	<b>\$44,259.52</b>	<b>\$112,885.50</b>	<b>30%</b>

<b>Equipment (530)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Computer / IT Purchases	\$0.00	\$0.00	\$1,716.66	\$0.00	\$1,716.66	
All other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$0.00	\$0.00	\$1,716.66	\$0.00	\$1,716.66	<b>% of Total</b>
<b>Total Equipment Cost</b>	\$0.00	\$0.00	\$5,202.00	\$0.00	\$5,202.00	33%

<b>Bd Member Payroll</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$1,485.82	\$1,812.36	\$1,325.52	\$29.33	\$4,653.03	
Other Employer-Paid Benefits	\$230.98	\$281.74	\$206.07	\$4.57	\$723.36	
DAS Payroll Charges	\$147.22	\$151.41	\$170.91	\$13.21	\$482.75	
<b>Actual Spent</b>	\$1,864.02	\$2,245.51	\$1,702.50	\$47.11	\$5,859.14	<b>% of Total</b>
<b>Total Board Payroll</b>	\$7,016.86	\$4,120.22	\$4,957.31	\$785.58	\$16,879.97	35%

<b>Board Travel &amp; Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Board Travel - In State	\$959.76	\$1,164.08	\$588.20	\$131.33	\$2,843.37	
Board Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Misc. Expenses (non-travel)	\$0.00	\$110.25	\$442.30	\$0.00	\$552.55	
Conference Registrations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$959.76	\$1,274.33	\$1,030.50	\$131.33	\$3,395.92	<b>% of Total</b>
<b>Total Board Maintenance</b>	\$3,942.00	\$4,130.13	\$5,567.53	\$153.60	\$13,793.26	25%

<b>Refunds (595)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
<b>Actual Spent</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<b>% of Total</b>
<b>Total Refunds</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% of Total</b>
<b>OPERATIONAL COSTS OT SECTION</b>	\$62,941.70	\$59,656.77	\$71,212.08	\$31,455.51	\$225,266.06	32%
<b>OPERATIONAL COSTS TOTAL</b>	\$196,044.46	\$182,384.62	\$225,229.14	\$95,366.52	\$699,024.74	

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% of Total</b>
<b>OT LIC. REVENUE</b>	\$93,620.00	\$14,890.00	\$21,100.00	\$22,550.00	\$152,160.00	17%
<b>TOTAL REVENUE</b>	\$135,375.00	\$324,500.00	\$363,460.00	\$46,395.00	\$869,730.00	

April 30, 2014 is 83.3% of FY 2014  
Day 304 of 365 days in FY 2014

# PT Section - Budget Report FY 2014

<b>Revenue</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>
OT Non-Renewal Income	\$26,880.00	\$14,890.00	\$21,100.00	\$7,890.00	\$70,760.00
OT Renewal Income	\$66,740.00	\$0.00	\$0.00	\$0.00	\$66,740.00
OTA Renewal Income	\$0.00	\$0.00	\$0.00	\$14,660.00	\$14,660.00
PT Non-Renewal Income	\$28,105.00	\$28,625.00	\$41,310.00	\$19,900.00	\$117,940.00
PT Renewal Income	\$0.00	\$276,150.00	\$295,750.00	(\$70.00)	\$571,830.00
PTA Renewal Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AT Non-Renewal Income	\$12,340.00	\$3,330.00	\$3,650.00	\$2,715.00	\$22,035.00
AT Renewal Income	\$0.00	\$100.00	(\$100.00)	\$0.00	\$0.00
Disciplinary Fines	\$1,100.00	\$1,200.00	\$1,750.00	\$1,300.00	\$5,350.00
Income from Other Sources	\$210.00	\$205.00	\$0.00	\$0.00	\$415.00
<b>Revenue Total</b>	<b>\$135,375.00</b>	<b>\$324,500.00</b>	<b>\$363,460.00</b>	<b>\$46,395.00</b>	<b>\$869,730.00</b>

<b>Staff Payroll (500)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$40,375.20	\$35,937.90	\$39,982.49	\$12,709.00	\$129,004.59	
Salaries - OT Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Paid Leave & Othr Compensat	\$7,213.27	\$6,078.13	\$9,369.65	\$1,408.32	\$24,069.37	
Other Employer-Paid Benefits	\$19,776.38	\$17,854.15	\$20,694.93	\$5,963.71	\$64,289.17	
DAS Payroll Charges	\$976.91	\$893.95	\$1,015.47	\$291.25	\$3,177.58	
<b>Actual Spent</b>	<b>\$68,341.76</b>	<b>\$60,764.13</b>	<b>\$71,062.54</b>	<b>\$20,372.28</b>	<b>\$220,540.71</b>	<b>% of Total</b>
<b>Total Staff Payroll</b>	<b>\$166,697.02</b>	<b>\$149,117.55</b>	<b>\$174,225.77</b>	<b>\$49,927.82</b>	<b>\$539,968.16</b>	<b>41%</b>

<b>Personal Services</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Hearing Officers	\$3,244.25	\$0.00	\$0.00	\$0.00	\$3,244.25	
Court Reporters	\$1,716.60	\$0.00	\$0.00	\$0.00	\$1,716.60	
Subpoena & Witness Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Conference Registration Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Dues, Subscriptions, ADA, Mis	\$526.00	\$2,715.00	\$1,029.00	\$136.80	\$4,406.80	
<b>Actual Spent</b>	<b>\$5,486.85</b>	<b>\$2,715.00</b>	<b>\$1,029.00</b>	<b>\$136.80</b>	<b>\$9,367.65</b>	<b>% of Total</b>
<b>Total Personal Services</b>	<b>\$5,870.85</b>	<b>\$2,715.00</b>	<b>\$1,470.00</b>	<b>\$240.00</b>	<b>\$10,295.85</b>	<b>91%</b>

<b>Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Office Supplies	\$1,128.94	\$309.39	\$645.56	\$461.68	\$2,545.57	
Credit Card Processing Fees	\$14.32	\$2,082.23	\$7,806.08	\$372.82	\$10,275.45	
Parking	\$52.20	\$208.80	\$156.60	\$52.20	\$469.80	
Staff Travel - In State	\$0.00	\$81.12	\$150.80	\$0.00	\$231.92	
Staff Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
VoIP & Toll-free Telephone	\$0.12	\$112.77	\$276.32	\$89.87	\$479.08	
FedEx/UPS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Document Shredding	\$29.00	\$46.75	\$43.50	\$14.50	\$133.75	
Ofc. Equip. Maint. & Repairs	\$0.00	\$0.00	\$1,175.01	\$0.00	\$1,175.01	
Printing/Copying	\$0.00	\$2,845.57	\$882.53	\$414.98	\$4,143.08	
Legal Notices in Newspapers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Rent (+space repairs, improve)	\$0.00	\$0.00	\$0.00	\$18,533.25	\$18,533.25	
Central Service Agency	\$4,532.37	\$3,463.66	\$4,735.10	\$5,055.98	\$17,787.11	
Telephone (DAS)	\$250.81	\$1,031.67	\$101.50	\$0.00	\$1,383.98	
DAS Motor Pool	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
State Purchasing Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
DAS Centralized Mail Service	\$0.00	\$939.11	\$1,035.55	\$0.00	\$1,974.66	
DAS IT Services	\$788.96	\$2,388.23	\$6,046.83	\$749.76	\$9,973.78	
Other	\$223.50	\$748.33	\$47.05	\$0.00	\$1,018.88	
<b>Actual Spent</b>	<b>\$7,020.22</b>	<b>\$14,257.63</b>	<b>\$23,102.43</b>	<b>\$25,745.04</b>	<b>\$70,125.32</b>	<b>% of Total</b>
<b>Total Maintenance Cost</b>	<b>\$12,517.73</b>	<b>\$22,301.72</b>	<b>\$33,806.53</b>	<b>\$44,259.52</b>	<b>\$112,885.50</b>	<b>62%</b>

<b>Equipment (530)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Computer / IT Purchases	\$0.00	\$0.00	\$3,017.16	\$0.00	\$3,017.16	
All other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$0.00	\$0.00	\$3,017.16	\$0.00	\$3,017.16	<b>% of Total</b>
<b>Total Equipment Cost</b>	\$0.00	\$0.00	\$5,202.00	\$0.00	\$5,202.00	<b>58%</b>

<b>Bd Member Payroll</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$3,350.93	\$1,345.10	\$2,191.62	\$555.25	\$7,442.90	
Other Employer-Paid Benefits	\$520.91	\$209.12	\$340.71	\$86.34	\$1,157.08	
DAS Payroll Charges	\$260.87	\$119.82	\$258.91	\$96.88	\$736.48	
<b>Actual Spent</b>	\$4,132.71	\$1,674.04	\$2,791.24	\$738.47	\$9,336.46	<b>% of Total</b>
<b>Total Board Payroll</b>	\$7,016.86	\$4,120.22	\$4,957.31	\$785.58	\$16,879.97	<b>55%</b>

<b>Board Travel &amp; Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Board Travel - In State	\$2,021.36	\$1,885.56	\$2,775.94	\$5.22	\$6,688.08	
Board Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Misc. Expenses (non-travel)	\$0.00	\$147.00	\$721.80	\$0.00	\$868.80	
Conference Registrations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$2,021.36	\$1,885.56	\$2,775.94	\$5.22	\$6,688.08	<b>% of Total</b>
<b>Total Board Maintenance</b>	\$3,942.00	\$4,130.13	\$5,567.53	\$153.60	\$13,793.26	<b>48%</b>

<b>Refunds (595)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
<b>Actual Spent</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<b>% of Total</b>
<b>Total Refunds</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<b>#DIV/0!</b>

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% of Total</b>
<b>OPERATIONAL COSTS PT SECTION</b>	\$87,002.90	\$81,296.36	\$103,778.31	\$46,997.81	\$319,075.38	46%
<b>OPERATIONAL COSTS TOTAL</b>	\$196,044.46	\$182,384.62	\$225,229.14	\$95,366.52	\$699,024.74	

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% of Total</b>
<b>PT LIC. REVENUE</b>	\$28,105.00	\$304,775.00	\$337,060.00	\$19,830.00	\$689,770.00	79%
<b>TOTAL REVENUE</b>	\$135,375.00	\$324,500.00	\$363,460.00	\$46,395.00	\$869,730.00	

April 30, 2014 is 83.3% of FY 2014  
Day 304 of 365 days in FY 2014

# AT Section - Budget Report FY 2014

<b>Revenue</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>
OT Non-Renewal Income	\$26,880.00	\$14,890.00	\$21,100.00	\$7,890.00	\$70,760.00
OT Renewal Income	\$66,740.00	\$0.00	\$0.00	\$0.00	\$66,740.00
OTA Renewal Income	\$0.00	\$0.00	\$0.00	\$14,660.00	\$14,660.00
PT Non-Renewal Income	\$28,105.00	\$28,625.00	\$41,310.00	\$19,900.00	\$117,940.00
PT Renewal Income	\$0.00	\$276,150.00	\$295,750.00	(\$70.00)	\$571,830.00
PTA Renewal Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AT Non-Renewal Income	\$12,340.00	\$3,330.00	\$3,650.00	\$2,715.00	\$22,035.00
AT Renewal Income	\$0.00	\$100.00	(\$100.00)	\$0.00	\$0.00
Disciplinary Fines	\$1,100.00	\$1,200.00	\$1,750.00	\$1,300.00	\$5,350.00
Income from Other Sources	\$210.00	\$205.00	\$0.00	\$0.00	\$415.00
<b>Revenue Total</b>	<b>\$135,375.00</b>	<b>\$324,500.00</b>	<b>\$363,460.00</b>	<b>\$46,395.00</b>	<b>\$869,730.00</b>

<b>Staff Payroll (500)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$26,662.82	\$23,563.93	\$26,847.41	\$8,098.21	\$85,172.37	
Salaries - OT Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Paid Leave & Othr Compensation	\$3,973.62	\$3,836.45	\$5,240.61	\$1,072.33	\$14,123.01	
Other Employer-Paid Benefits	\$11,594.10	\$10,738.75	\$12,425.99	\$3,578.02	\$38,336.86	
DAS Payroll Charges	\$607.64	\$567.90	\$640.69	\$183.13	\$1,999.36	
<b>Actual Spent</b>	<b>\$42,838.18</b>	<b>\$38,707.03</b>	<b>\$45,154.70</b>	<b>\$12,931.69</b>	<b>\$139,631.60</b>	<b>% of Total</b>
<b>Total Staff Payroll</b>	<b>\$166,697.02</b>	<b>\$149,117.55</b>	<b>\$174,225.77</b>	<b>\$49,927.82</b>	<b>\$539,968.16</b>	<b>26%</b>

<b>Personal Services (510)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Hearing Officers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Court Reporters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Subpoena & Witness Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Conference Registration Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Dues, Subscriptions, ADA, Misc	\$168.00	\$0.00	\$94.50	\$21.60	\$284.10	
<b>Actual Spent</b>	<b>\$168.00</b>	<b>\$0.00</b>	<b>\$94.50</b>	<b>\$21.60</b>	<b>\$284.10</b>	<b>% of Total</b>
<b>Total Personal Services</b>	<b>\$5,870.85</b>	<b>\$2,715.00</b>	<b>\$1,470.00</b>	<b>\$240.00</b>	<b>\$10,295.85</b>	<b>3%</b>

<b>Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Office Supplies	\$175.18	\$48.01	\$100.18	\$71.64	\$395.01	
Credit Card Processing Fees	\$12.81	\$66.95	\$85.21	\$5.68	\$170.65	
Parking	\$8.10	\$32.40	\$24.30	\$8.10	\$72.90	
Staff Travel - In State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Staff Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
VoIP & Toll-free Telephone	\$0.02	\$17.49	\$42.87	\$14.04	\$74.42	
FedEx/UPS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Document Shredding	\$4.50	\$7.25	\$6.75	\$2.25	\$20.75	
Ofc. Equip. Maint. & Repairs	\$0.00	\$0.00	\$182.33	\$0.00	\$182.33	
Printing/Copying	\$0.00	\$114.67	\$0.18	\$64.40	\$179.25	
Legal Notices in Newspapers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Rent (+space repairs, improve)	\$0.00	\$0.00	\$0.00	\$2,875.86	\$2,875.86	
Central Service Agency	\$715.64	\$537.46	\$734.76	\$784.55	\$2,772.41	
Telephone (DAS)	\$39.60	\$160.09	\$15.75	\$0.00	\$215.44	
DAS Motor Pool	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
State Purchasing Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
DAS Centralized Mail Service	\$0.00	\$145.73	\$160.69	\$0.00	\$306.42	
DAS IT Services	\$122.43	\$370.57	\$938.29	\$116.34	\$1,547.63	
Other	\$34.39	\$52.93	\$5.40	\$0.00	\$92.72	
<b>Actual Spent</b>	<b>\$1,112.67</b>	<b>\$1,553.55</b>	<b>\$2,296.71</b>	<b>\$3,942.86</b>	<b>\$8,905.79</b>	<b>% of Total</b>
<b>Total Maintenance Cost</b>	<b>\$12,517.73</b>	<b>\$22,301.72</b>	<b>\$33,806.53</b>	<b>\$44,259.52</b>	<b>\$112,885.50</b>	<b>8%</b>

<b>Equipment (530)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Computer / IT Purchases	\$0.00	\$0.00	\$468.18	\$0.00	\$468.18	
All other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$0.00	\$0.00	\$468.18	\$0.00	\$468.18	% of Total
<b>Total Equipment Cost</b>	\$0.00	\$0.00	\$5,202.00	\$0.00	\$5,202.00	9%

<b>Bd Member Payroll</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Basic Wages	\$719.46	\$138.81	\$308.93	\$0.00	\$1,167.20	
Other Employer-Paid Benefits	\$111.85	\$21.59	\$48.03	\$0.00	\$181.47	
DAS Payroll Charges	\$188.82	\$40.27	\$106.61	\$0.00	\$335.70	
<b>Actual Spent</b>	\$1,020.13	\$200.67	\$463.57	\$0.00	\$1,684.37	% of Total
<b>Total Board Payroll</b>	\$7,016.86	\$4,120.22	\$4,957.31	\$785.58	\$16,879.97	10%

<b>Board Travel &amp; Maintenance (520)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
Board Travel - In State	\$900.88	\$306.24	\$672.64	\$17.05	\$1,896.81	
Board Travel - Out of State	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Misc. Expenses (non-travel)	\$60.00	\$517.00	\$366.65	\$0.00	\$943.65	
Conference Registrations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Actual Spent</b>	\$900.88	\$306.24	\$672.64	\$17.05	\$1,896.81	% of Total
<b>Total Board Maintenance</b>	\$3,942.00	\$4,130.13	\$5,567.53	\$153.60	\$13,793.26	14%

<b>Refunds (595)</b>	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	
<b>Actual Spent</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	% of Total
<b>Total Refunds</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% of Total</b>
<b>OPERATIONAL COSTS AT SECTION</b>	\$46,039.86	\$40,767.49	\$49,150.30	\$16,913.20	\$152,870.85	22%
<b>OPERATIONAL COSTS TOTAL</b>	\$196,044.46	\$182,384.62	\$225,229.14	\$95,366.52	\$699,024.74	

	<b>1st Qtr.</b>	<b>2nd Qtr.</b>	<b>3rd Qtr.</b>	<b>4th Qtr.</b>	<b>Grand Total</b>	<b>% of Total</b>
<b>AT LIC. REVENUE</b>	\$12,340.00	\$3,430.00	\$3,550.00	\$2,715.00	\$22,035.00	3%
<b>TOTAL REVENUE</b>	\$135,375.00	\$324,500.00	\$363,460.00	\$46,395.00	\$869,730.00	

April 30, 2014 is 83.3% of FY 2014  
Day 304 of 365 days in FY 2014

		<b># of Days to Send Application Receipt Letter</b>	<b># of Days from Application Receipt to Completed Application</b>	<b># of Days to Approve Completed Application</b>
<b>April 2013</b> 66 applications	Median	1	20.5	2
	Mean	1.61	36.67	2.92
	Range	0 to 38 days	0 to 315 days	0 to 33 days
<b>May 2013</b> 39 applications	Median	1	34	2
	Mean	0.92	47.28	2.21
	Range	0 to 8 days	0 to 167 days	0 to 11 days
<b>June 2013</b> 66 applications	Median	1	38	1
	Mean	1.56	43.92	1.95
	Range	0 to 6 days	0 to 221 days	0 to 12 days
<b>July 2013</b> 106 applications	Median	1	18.5	2
	Mean	1.29	32.97	2.62
	Range	0 to 7 days	0 to 300 days	0 to 8 days
<b>August 2013</b> 93 applications	Median	1	33	1
	Mean	1.46	40.03	2.62
	Range	0 to 8 days	0 to 158 days	0 to 32 days
<b>September 2013</b> 83 applications	Median	1	38	1
	Mean	1.40	47.14	1.92
	Range	0 to 6 days	0 to 423 days	0 to 54 days
<b>October 2013</b> 59 applications	Median	1	38	1
	Mean	1.75	46.08	2.25
	Range	0 to 43 days	0 to 195 days	0 to 9 days
<b>November 2013</b> 22 applications	Median	1	38.5	1
	Mean	1.45	64.18	1.55
	Range	0 to 6 days	0 to 241 days	0 to 5 days
<b>December 2013</b> 32 applications	Median	1	19	0.5
	Mean	1.16	40.53	1.09
	Range	0 to 4 days	0 to 331 days	0 to 4 days
<b>January 2014</b> 37 applications	Median	1	39	0
	Mean	1.16	43.38	1.43
	Range	0 to 4 days	0 to 131 days	0 to 35 days
<b>February 2014</b> 96 applications	Median	1	37	0
	Mean	1.43	46.04	1.53
	Range	0 to 34 days	0 to 384 days	0 to 8 days
<b>March 2014</b> 81 applications	Median	1	38	2
	Mean	1.07	42.28	2.72
	Range	0 to 6 days	0 to 191 days	0 to 41 days
<b>April 2014</b> 51 applications	Median	1	26	1
	Mean	0.92	36.24	0.90
	Range	0 to 10 days	0 to 172 days	0 to 3 days

		# of Days to Send Application Receipt Letter	# of Days from Application Receipt to Completed Application	# of Days to Approve Completed Application
<b>April 2013</b> 33 applications	Median	1	59	1
	Mean	2.61	82.42	2.85
	Range	0 to 55 days	0 to 399 days	0 to 43 days
<b>May 2013</b> 405 applications	Median	1	79	2
	Mean	2.39	82.50	3.36
	Range	0 to 181 days	0 to 226 days	0 to 73 days
<b>June 2013</b> 180 applications	Median	1	28	4
	Mean	1.62	45.38	4.81
	Range	0 to 24 days	0 to 385 days	0 to 28 days
<b>July 2013</b> 85 applications	Median	1	67	2
	Mean	4.96	77.52	4.75
	Range	0 to 242 days	0 to 326 days	0 to 56 days
<b>August 2013</b> 87 applications	Median	1	98	1
	Mean	1.24	86.79	1.55
	Range	0 to 5 days	0 to 190 days	0 to 11 days
<b>September 2013</b> 162 applications	Median	1	29	2
	Mean	1.24	62.79	3.92
	Range	0 to 9 days	0 to 814 days	0 to 21 days
<b>October 2013</b> 44 applications	Median	1	73	1
	Mean	1.05	102.91	2.23
	Range	0 to 5 days	13 to 358 days	0 to 16 days
<b>November 2013</b> 38 applications	Median	1	64.5	0
	Mean	1.16	70.58	1.87
	Range	0 to 4 days	0 to 344 days	0 to 40 days
<b>December 2013</b> 78 applications	Median	1	27	0
	Mean	1.81	79.60	1.91
	Range	0 to 4 days	0 to 327 days	0 to 6 days
<b>January 2014</b> 73 applications	Median	0	52	1
	Mean	0.60	60.42	0.73
	Range	0 to 3 days	8 to 256 days	0 to 35 days
<b>February 2014</b> 44 applications	Median	0	47.5	0
	Mean	1.02	79.02	1.84
	Range	0 to 7 days	0 to 322 days	0 to 8 days
<b>March 2014</b> 31 applications	Median	1	23	1
	Mean	2.13	42.74	5.16
	Range	0 to 16 days	0 to 182 days	0 to 121 days
<b>April 2014</b> 68 applications	Median	1	70	0.5
	Mean	6.56	82.78	2.16
	Range	0 to 366 days	7 to 348 days	0 to 85 days

		# of Days to Send Application Receipt Letter	# of Days from Application Receipt to Completed Application	# of Days to Approve Completed Application
<b>April 2013</b> 10 applications	Median	0.5	15	1
	Mean	1.00	22.60	0.70
	Range	0 to 6 days	0 to 76 days	0 to 2 days
<b>May 2013</b> 18 applications	Median	1	19.5	2
	Mean	3.06	26.50	1.83
	Range	0 to 44 days	0 to 64 days	0 to 5 days
<b>June 2013</b> 48 applications	Median	1	16.5	2
	Mean	2.04	19.79	2.35
	Range	0 to 13 days	0 to 67 days	0 to 12 days
<b>July 2013</b> 80 applications	Median	1	16.5	2
	Mean	1.74	29.23	2.91
	Range	0 to 21 days	0 to 349 days	0 to 26 days
<b>August 2013</b> 34 applications	Median	1	23.5	1
	Mean	1.18	35.71	1.62
	Range	0 to 5 days	1 to 363 days	0 to 6 days
<b>September 2013</b> 36 applications	Median	1	26.5	1
	Mean	2.22	39.00	2.53
	Range	0 to 46 days	0 to 193 days	0 to 11 days
<b>October 2013</b> 19 applications	Median	1	19	1
	Mean	0.63	36.42	1.37
	Range	0 to 3 days	0 to 358 days	0 to 16 days
<b>November 2013</b> 3 applications	Median	0	14	0
	Mean	0.33	44.00	0.33
	Range	0 to 1 days	5 to 113 days	0 to 16 days
<b>December 2013</b> 8 applications	Median	0.5	16.5	0.5
	Mean	4.13	26.50	0.75
	Range	0 to 30 days	0 to 110 days	0 to 3 days
<b>January 2014</b> 11 applications	Median	1	13	1
	Mean	1.09	17.36	1.73
	Range	0 to 5 days	0 to 47 days	0 to 5 days
<b>February 2014</b> 9 applications	Median	1	43	1
	Mean	1.78	38.33	1.78
	Range	0 to 5 days	6 to 75 days	0 to 6 days
<b>March 2014</b> 10 applications	Median	1	16.5	2
	Mean	2.30	18.30	1.80
	Range	0 to 8 days	4 to 40 days	0 to 6 days
<b>April 2014</b> 12 applications	Median	0.5	7	1
	Mean	0.67	24.08	0.83
	Range	0 to 3 days	0 to 78 days	0 to 2 days

		# of Days to Send Application Receipt Letter	# of Days from Application Receipt to Completed Application	# of Days to Approve Completed Application
<b>April 2013</b> 109 applications	Median	1	29	2
	Mean	1.85	49.23	2.70
	Range	0 to 55 days	0 to 399 days	0 to 43 days
<b>May 2013</b> 462 applications	Median	1	76	2
	Mean	2.29	77.34	3.20
	Range	0 to 181 days	0 to 226 days	0 to 73 days
<b>June 2013</b> 294 applications	Median	1	27	3
	Mean	1.68	40.87	3.77
	Range	0 to 24 days	0 to 385 days	0 to 28 days
<b>July 2013</b> 271 applications	Median	1	32	2
	Mean	2.58	45.84	3.38
	Range	0 to 242 days	0 to 349 days	0 to 56 days
<b>August 2013</b> 214 applications	Median	1	41	1
	Mean	1.33	58.36	2.03
	Range	0 to 8 days	0 to 363 days	0 to 32 days
<b>September 2013</b> 281 applications	Median	1	34	1
	Mean	1.41	55.12	3.15
	Range	0 to 46 days	0 to 814 days	0 to 54 days
<b>October 2013</b> 122 applications	Median	1	43	1
	Mean	1.32	65.07	2.11
	Range	0 to 43 days	0 to 358 days	0 to 16 days
<b>November 2013</b> 63 applications	Median	1	54	0
	Mean	1.22	67.08	1.68
	Range	0 to 6 days	0 to 344 days	0 to 40 days
<b>December 2013</b> 118 applications	Median	1	27	0
	Mean	1.19	52.62	1.26
	Range	0 to 30 days	0 to 331 days	0 to 6 days
<b>January 2014</b> 121 applications	Median	1	43	1
	Mean	0.82	51.30	1.03
	Range	0 to 5 days	0 to 256 days	0 to 35 days
<b>February 2014</b> 149 applications	Median	1	39	0
	Mean	1.33	55.32	1.64
	Range	0 to 34 days	0 to 384 days	0 to 8 days
<b>March 2014</b> 122 applications	Median	1	30	1.5
	Mean	1.44	40.43	3.26
	Range	0 to 16 days	0 to 191 days	0 to 121 days
<b>April 2014</b> 131 applications	Median	1	57	1
	Mean	3.82	59.28	1.55
	Range	0 to 366 days	0 to 348 days	0 to 85 days

course name	hours app	approval #	date approved
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1	Understanding Dementia		
	6	140438	4/10/2014
contact first, last	Abigail	Andres	

2	Concussion Review		
	2	140444	4/10/2014
contact first, last	Tina	Griffiths	

3	St. Rita's Spring Sports Medicine Symposium 2014		
	5	140464ETH	4/16/2014
contact first, last	Kris	Laise	

4	Functional Thoracic Spine		
	8	140470	4/16/2014
contact first, last	Diana	Huffman	

**Course name and Contact**

1

PTST 10001, Principles of Patient Care

Richard Hover

**Board Action**  Approved - #CE Awarded \_\_\_\_\_  Denied  Request More Info

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<b>Credential</b>	<b>Name</b>	<b>Status</b>
AT Applicant - Examination	BARTLETT KAYLA	COMPLETED
AT Applicant - Examination	CARROLL JILL	COMPLETED
AT Applicant - Examination	CHURBOCK JESSICA	COMPLETED
AT Applicant - Examination	GOYETTE KAYLA	COMPLETED
AT Applicant - Examination	KAPLAN DUSTIN	COMPLETED
AT Applicant - Examination	PATRICK KYLE	COMPLETED
AT Applicant - Examination	POZZUTO ANTHONY	COMPLETED
AT Applicant - Examination	REEL ADAM	COMPLETED
AT Applicant - Examination	SABO EMILY	COMPLETED
AT Applicant - Examination	SAULINAS ELIZABETH	COMPLETED
AT Applicant - Examination	SHOEMAKER ALLISON	COMPLETED
AT Applicant - Examination	TREVINO GABRAIEL	COMPLETED
AT Applicant - Examination	WHITMORE SAMUEL	COMPLETED
AT Applicant - Examination	YEAGER JENNA	COMPLETED
<b>AT Applicant - Examination Count</b>		<b>14</b>
AT Applicant - Endorsement	HARRIS RACHEL	COMPLETED
AT Applicant - Endorsement	MOLLNER BRADY	COMPLETED
AT Applicant - Endorsement	RYNAS STEPHANIE	COMPLETED
AT Applicant - Endorsement	WALKER AARON	COMPLETED
<b>AT Applicant - Endorsement Count</b>		<b>4</b>
AT Applicant - Reinstatement	BUCHANAN PATRICIA	COMPLETED
AT Applicant - Reinstatement	KERN HOLLY	COMPLETED
AT Applicant - Reinstatement	SHOCKEY SETH	COMPLETED
<b>AT Applicant - Reinstatement Count</b>		<b>3</b>
<b>Grand Count</b>		<b>21</b>

# ATHLETIC TRAINERS SECTION ENFORCEMENT REVIEW PANEL MEETING

Date: May 2, 2014

Meeting Time: 12:00 pm

Board Office Conference Room-Via Conference Call

## Statistics:

“New” cases opened since the March meeting: 4

Cases “closed” at the March meeting: 1

Cases “currently open”: 5  
(1 is license denial)

Active consent agreements: 0

### Occupational Therapy Section

New cases opened since the March meeting: 2

Cases closed at the March meeting: 13

Cases currently open: 8

Active consent agreements: 10

Adjudication monitoring: 1

### Physical Therapy Section

New cases opened since the March meeting: 4

Cases closed at the March meeting: 18

Cases currently open: 14

Active consent agreements: 4

Adjudication orders being monitored: 2

**\*Statistics as of 5/2/14**



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**Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board**

77 South High Street, 16<sup>th</sup> Floor  
Columbus, Ohio 43215-6108

Governor  
*John R. Kasich*  
Executive Director  
*Jeffrey M. Rosa*

## AT Correspondence – May 2014

No.	Correspondent Name and Subject
1.	<b><u>Joshua Knott, AT:</u></b> Mr. Knott asked the Section if athletic trainers can bill for services under referral from a nurse practitioner with a physician co-signature
2.	<b><u>Liz Miller:</u></b> Ms. Miller asked the Section if athletic trainers can apply and remove casts.

Knott, Joshua [JKnot@seormc.org]

**Sent:** Wednesday, March 05, 2014 5:39 PM

**To:** OTPTAT Board

**Categories:** Blue Category

Hello,

Can an AT bill for service under a nurse practitioner if a physician also signs the order?

Thank you for your time and consideration.

Joshua Knott, MA, AT, ATC, CSCS

AT Correspondence # 1

Page 1

Meeting Date: **MAY 7 2014**

License #: **AT. 001903**



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*Jeffrey M. Rosa*

AT1  
May 2014

Joshua Knott, AT  
JKnot@seormc.org

AT.001903

Dear Mr. Knott:

This letter is in response to your correspondence regarding whether athletic trainers can bill for services under referral from a nurse practitioner with a physician co-signature.

Section 4755.60(A) of the Ohio Revised Code states:

(A) "Athletic training" means the practice of prevention, recognition, and assessment of an athletic injury and the complete management, treatment, disposition, and reconditioning of acute athletic injuries upon the referral of an individual authorized under Chapter 4731. of the Revised Code to practice medicine and surgery, osteopathic medicine and surgery, or podiatry, a dentist licensed under Chapter 4715. of the Revised Code, a physical therapist licensed under this chapter, or a chiropractor licensed under Chapter 4734. of the Revised Code. Athletic training includes the administration of topical drugs that have been prescribed by a licensed health professional authorized to prescribe drugs, as defined in section 4729.01 of the Revised Code. Athletic training also includes the organization and administration of educational programs and athletic facilities, and the education of and consulting with the public as it pertains to athletic training.

It is the position of the Athletic Trainers Section that nurse practitioners and physician assistants may refer to athletic trainers provided a physician has given them the authority to do so. A valid prescription with the co-signature of the physician is required. However, nurse practitioners and physician assistants may not directly refer to licensed athletic trainers. Should a physician be willing to extend his authority to the nurse practitioner or physician assistant to refer for athletic training, then, in fact, the nurse practitioner or physician assistant has merely become a conduit or facilitator of the physician's actual order. Please note the referral is initiated by the physician who is utilizing the nurse practitioner or physician assistant to extend information to you, the athletic trainer.

If you have any questions about the extension of authority by the physician, you should contact that physician. You may want to contact the Ohio Board of Nursing and the State Medical Board of Ohio regarding specific definitions pertaining to nurse practitioners and physician assistants.

The Section thanks you for your correspondence and appreciates your understanding that it is your professional responsibility to remain current with professional standards. Please visit the



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Board's website (<http://otptat.ohio.gov>) to review the Athletic Training Practice Act and other information related to the regulation of athletic training in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter (<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Athletic Trainers Section*

**Jeffrey M. Rosa**  
Executive Director

JMR:dm

**athletic training question**

Liz [lmlbuddy@yahoo.com]

**Sent:** Thursday, April 10, 2014 8:26 PM

**To:** OTPTAT Board

**Categories:** Blue Category

Hello OTPTAT board,

I have a brief question. Under Ohio licensure for AT's, are they allowed to place/apply casts and remove them? If so, under what type of supervision?

Thank you,

Liz Miller, ATC

AT Correspondence # 2

Page 1

Meeting Date: MAY 7 2014

License #: AT. 003592



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*Jeffrey M. Rosa*

AT2  
May 2014

Liz Miller, AT  
lmlbuddy@yahoo.com

AT.003592

Dear Mr. Knott:

This letter is in response to your correspondence regarding whether athletic trainers can apply and remove casts.

When determining if a task or procedure falls within the scope of athletic training practice, the Section reviews the available literature that forms the basis of athletic training practice in the United State. These documents include:

- (1) *Role Delineation Study/Practice Analysis, Sixth Edition*, which identifies the essential knowledge and skills for an entry-level athletic trainer. This document is published by the Board of Certification, Inc. and is available at <http://bocatc.org/resources/role-delineation-study-practice-analysis>;
- (2) *Athletic Training Education Competencies (5th Edition)*, which is published by the National Athletic Trainers Association and recognized by the Commission on Accreditation of Athletic Training Education (CAATE) as the knowledge, skills and clinical abilities to be mastered by professional program students. It is available at <http://www.nata.org/education/education-resources>.

According to section 4755.60 (A) of the Ohio Revised Code, treatment consists of the techniques and procedures used in giving care in situations where assistance is required or requested. Such actions should be reasonable and prudent within the scope of practice of athletic training.

All treatment should be rendered in accordance with any established protocol for the venue. Physician directives should be followed at all times. Permission to treat should be obtained. Athletic trainers should not attempt any treatment measure unfamiliar to them or outside the scope of athletic training practice. Some variance may be seen in treatment, depending upon educational background, facility or setting limitations, and patient response. These variances based upon advanced education or training must be identified within the standard operating procedures and reviewed and approved by the team physician or medical director as dictated below.

**Standard Operating Procedures:** It is the professional responsibility of every athletic trainer to have written policies and procedures. Athletic trainers are encouraged to review current policies and procedures with their employers to determine if the existing policies are within the scope of athletic training practice.



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The Athletic Trainers Section has no guidelines with regards to policy and procedure content. However, the Athletic Trainers Section does advocate that all athletic trainers have written policies and procedures to guide the day-to-day operations of athletic training care.

If no athletic training policies and procedures exist, please establish them and put them in writing. Standard operating policies and procedures should be reviewed and approved by a team physician or an organization's medical director.

The Section thanks you for your correspondence. Please visit the Board's website (<http://otptat.ohio.gov>) to review the Athletic Training Practice Act and other information related to the regulation of athletic training in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter (<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Athletic Trainers Section*

**Jeffrey M. Rosa**  
Executive Director

JMR:dm



**Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board**  
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*Jeffrey M. Rosa*

### Joint Board Correspondence- May 2014

No.	Correspondent Name and Subject
1.	<b><u>Kristina Smith, OT/L:</u></b> Ms. Bachman asked the Occupational and Physical Therapy Sections whether occupational and physical therapists are obligated to continue treating a client if the therapy goals have been met.
2/3.	<b><u>Heather Jennings, PT:</u></b> Ms. Jennings asked the Physical Therapy and Athletic Trainers Sections questions regarding whether community colleges and professional sports are covered under Ohio Physical Therapy and Athletic Training laws regarding concussion management and clarification on the documentation requirement for athletic trainers.
4.	<b><u>Thomas Paris, PT:</u></b> Mr. Paris asked the Occupational and Physical Therapy Sections questions regarding occupational and physical therapy practitioners can perform tracheostomy suctioning.
5.	<b><u>Michelle Tristani:</u></b> Ms. Tristani asked the Occupational and Physical Therapy Sections questions regarding whether the occupational and physical therapy Sections offer a limited permit, and asked for clarification on the signature designation for occupational and physical therapy practitioners.
6.	<b><u>Michael Millward:</u></b> Ms. Millward asked the Physical Therapy and Athletic Trainers Sections questions requesting clarification on the physical therapy and athletic trainers requirements regarding concussion management

**OT and PT coorespondence**

Smith, Tina [tsmith@graceworks.org]

**Sent:** Monday, March 17, 2014 1:58 PM

**To:** OTPAT Board

**Categories:** Blue Category

Hello,

I spoke with Jeff Barker today and it was suggested I send an email .

I am an OT who is employed at a skilled nursing facility here in Dayton. We have had a few cases with insurance companies recently that have raised questions with our staff.

Here is the scenario:

OT and PT will discharge a patient from therapy. The patient appeals this decision to a third party case management company. (Keypro) If the patient wins the appeal process, we are told to keep treating the patient.

Are we obligated to keep treating the patient even if our goals have been met or if the patient is at maximal potential?

Would you be able to provide a Position Statement regarding this situation?

Thank you,  
Kristina Smith, OT/L

JB Correspondence # 1  
Page 1  
Meeting Date: **MAY 2014**

License #: OT.001298



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*Jeffrey M. Rosa*

JB1  
May 2014

Kristina Smith, OT/L  
tsmith@graceworks.org

OT.005325

Dear Ms. Bachman:

This letter is in response to your correspondence regarding whether occupational and physical therapists are obligated to continue treating a client if the therapy goals have been met. Your question addresses both occupational and physical therapy practice. Please be aware that the regulation of these professions is undertaken by two separate entities.

If the physical therapy goals have been met and no further skilled physical therapy needs have been identified then there is no obligation to continue treatment.

There may be specific instances where no improvement is expected but skilled physical therapy is needed in order to prevent or slow deterioration and maintain maximum level of function.

Your question also relates to payer policies. The Physical Therapy Section recommends that you contact the Ohio Chapter or Reimbursement Department of the American Physical Therapy Association.

In response to your scenario, occupational therapy practitioners may encounter situations in which they feel a client would not benefit from further intervention, where a client is ready to be discharged from occupational therapy services, but other interdisciplinary team members, managers, and/or the client's family disagree. **According to rule 4755-7-08 (C)(1)(b) of the Ohio Administrative Code, an occupational therapist or occupational therapy assistant shall not provide treatment interventions that are not warranted by the client's condition or continue treatment beyond the point of reasonable benefit to the client.** Occupational therapy practitioners must clearly document and communicate with the interdisciplinary team.

If the manager, interdisciplinary team, and/or client/client's family decides to continue occupational therapy services after such communication, the occupational therapist may continue to provide services **after the client is made aware that no further benefit is expected.** In this situation, the occupational therapist would not be in violation of rule 4755-7-08 (C)(1)(b).

The Sections thank you for your correspondence and appreciate your understanding that it is your professional responsibility to remain current with professional standards. Please visit the Board's website ([www.otptat.ohio.gov](http://www.otptat.ohio.gov)) to review the Occupational Therapy and Physical Therapy Practice Acts and other information related to the regulation of occupational and



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**Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board**

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physical therapy in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter (<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Occupational Therapy and Physical Therapy Sections*

**Jeffrey M. Rosa**  
Executive Director

**JMR:dm**

**From OTPTAT Board Website**

Jennings, Heather H [Heather.Jennings@health-partners.org]

**Sent:** Wednesday, March 19, 2014 4:33 PM

**To:** OTPTAT Board

**Categories:** Blue Category

Hello,

I am a physical therapist who has questions regarding House Bill #143 on Concussive Management. Does that bill apply to school aged athletes k-12 or to athletes for a junior college or minor league team. Our company provides coverage for a junior college (Lorain County Community College) and a independent minor league baseball team called the Lake Erie Crushers. I would like to know the laws and regulations governing concussion with these set of athletes.

Also, would you be able to direct me to the documentation requirements for athletic trainers. Thank you so much!

Heather

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JB Correspondence # 2

Page 1

Meeting Date: MAY 2014

License #: PT. 013740

**Clarification**

Jennings, Heather H [Heather.Jennings@health-partners.org]

**Sent:** Tuesday, April 08, 2014 2:43 PM**To:** OTPTAT Board**Categories:** Blue Category

Hello,

My company Mercy provides game sports coverage only and it was brought to her attention that some of the visiting team AT's are not providing care as what one clarified that may be a misperception of restorative care vs first aide and basic care. I want to make the clarification of what can be legally provided.

Also, seeing as this is a junior college does house bill 143 apply or highly recommended. If a home or away player shows up for a game and a possibly suspected concussion injury that was not cleared by anyone can a PT assess that player and if no signs of concussion RTP or regardless of AT or PT the player the player must wait 24 hrs of injury and follow SOP in conjunction with physician. Thank you for your help!

Heather

Sent from my iPhone

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JB Correspondence # 3Page 1Meeting Date: **MAY 2014**License #: PT, 013740



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Executive Director  
*Jeffrey M. Rosa*

JB2/JB3  
May 2014

Heather Jennings, PT  
Heather.Jennings@health-partners.org

OTA.03682

Dear Ms. Jennings:

This letter is in response to your correspondence regarding whether community colleges and professional sports are covered under Ohio laws regarding concussion management and clarification on the documentation requirement for athletic trainers. Your question addresses both physical therapy and athletic training practice. Please be aware that the regulation of these professions is undertaken by two separate entities.

As noted in the Legislative Service Commission bill analysis for Sub. H.B. 143, the provisions of the act apply to all of the following entities:

1. Public schools, including schools operated by school districts, community schools, and science, technology, engineering, and math (STEM) schools;
2. All private schools, including both chartered and nonchartered nonpublic schools; and
3. "Youth sports organizations," which are defined in H.B. 143 as public or nonpublic entities that organize athletic activities in which the athletes are not more than 19 years old and are required to pay a fee to participate in the athletic activity or whose cost to participate is sponsored by a business or nonprofit organization.

As a result, the provision of H.B. 143 would not apply for athletes participating on a junior college athletic team or a minor league baseball team.

Although H.B. 143 does not apply to adult and/or college level athletes, you are encouraged to consult the bylaws of the governing body for the community college's athletics department ([www.njcaa.org](http://www.njcaa.org)) and the baseball team's league to determine if those entities have requirements and recommendations pertaining to the recognition and management of concussions. You would also be encouraged to follow current best practice in the recognition and management of concussions which is outlined in various consensus and position statements. A concussion recognition and management policy developed using these documents and in consultation with the team physician would be the best course of action.

In regards to your question regarding athletic trainer's documentation requirements, under an athletic training referral, the athletic trainer functions independently and is responsible for documentation. What this documentation consists of is governed by best practices and employer policies.

**Comment [SS1]:** Jeff, I didn't see any specific of what AT documentation consists of anywhere, are there state standards for documentation anywhere? This section needs expanded, but not sure where to go, the questions was very vague.

The Sections thank you for your correspondence and appreciate your understanding that it is your professional responsibility to remain current with professional standards. Please visit the Board's website ([www.otptat.ohio.gov](http://www.otptat.ohio.gov)) to review the Athletic Training and Physical Therapy Practice Acts and other information related to the regulation of athletic training and physical therapy in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter



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(<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Physical Therapy and Athletic Trainers Sections*

**Jeffrey M. Rosa**  
Executive Director

**JMR:dm**

DRAFT

### Scope of Practice

Paris, Thomas [parist@ccf.org]

**Sent:** Wednesday, April 09, 2014 8:40 AM

**To:** OTPTAT Board

**Categories:** Blue Category

Dear Board Members,

Is suctioning of patient's airway included in PT / OT scope of practice?

Thank you,

Thomas Paris



**Thomas J. Paris, RRT, BA** | Manager | Respiratory Therapy | Respiratory Institute  
Cleveland Clinic | 9500 Euclid Avenue, M-56 | Cleveland, OH 44195  
Office: (216) 444-1172 | Fax: (216) 444-8279 | E-Mail: [parist@ccf.org](mailto:parist@ccf.org)

=====  
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JB Correspondence # 4

Page 1

Meeting Date: **MAY 2014**

License #:



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*Jeffrey M. Rosa*

JB4  
May 2014

Thomas Paris  
parist@ccf.org

Dear Mr. Paris:

This letter is in response to your correspondence regarding whether occupational and physical therapy practitioners can perform tracheostomy suctioning. Your question addresses both occupational therapy and physical therapy practice. Please be aware that the regulation of these professions is undertaken by two separate entities.

It is the opinion of the Ohio Physical Therapy Section that it is not within the scope of practice for a physical therapist assistant (PTA) to do tracheostomy suctioning even with training. It is within the scope of practice, however, for a physical therapist (PT) to do this type of treatment if trained and shown to be competent in the intervention, as suctioning requires an examination for appropriateness for this intervention and evaluation of how much and when to stop treatment.

In accordance with section 4755.04 (A)(3) of the Ohio Revised Code, it is the position of the Occupational Therapy Section that occupational therapy practitioners may use physical agent modalities in the provision of occupational therapy services provided that the occupational therapy practitioner demonstrates and documents competency in the modality, in accordance with rule 4755-7-08 of the Administrative Code, and is practicing within the occupational therapy scope of practice. If the modality will be administered by an occupational therapy assistant both the supervising occupational therapist and occupational therapy assistant must document and demonstrate competency in the techniques or modality.

The Sections thank you for your correspondence and appreciate your understanding that it is your professional responsibility to remain current with professional standards. Please visit the Board's website ([www.otptat.ohio.gov](http://www.otptat.ohio.gov)) to review the Occupational Therapy and Physical Therapy Practice Acts and other information related to the regulation of occupational and physical therapy in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter (<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Occupational Therapy and Physical Therapy Sections*

**Jeffrey M. Rosa**  
Executive Director

JMR:dm

**OT and PT Licensure Questions**

Tristani, Michelle [Michelle.Tristani@peoplefirstrehab.com]

**Sent:** Tuesday, April 15, 2014 9:41 AM**To:** OTPTAT Board**Categories:** Blue Category

Hello,

I have a few questions regarding OT, COTA, PT and PTA licenses.

1. Do you offer temporary licenses for OT, COTA, PT and PTA?
2. If you do offer temporary licenses, is direct, onsite supervision required during the time period of temp licensure?
3. Does the board have state specific signature requirements for credentials for OT, COTA, PT and PTA within clinical documentation? More specifically, does the board require the OT, COTA, PT and PTA license number next to the signature on clinical documentation?

Thanks so much!

Michelle

Michelle Tristani, MS/CCC-SLP

Cell: 508 654-2382

Fax: 866 652-7747

[michelle.tristani@rehabcare.com](mailto:michelle.tristani@rehabcare.com)

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Dedicated to Hope, Healing and Recovery.

JB Correspondence # 5  
Page 1  
Meeting Date: **MAY 2014**

License #:



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Governor  
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Executive Director  
*Jeffrey M. Rosa*

JB5  
May 2014

Michelle Tristani  
Michelle.Tristani@peoplefirstrehab.com

Dear Ms. Tristani:

This letter is in response to your correspondence asking whether the Board issues temporary licenses and for clarification on the signature designation for occupational and physical therapy practitioners. Your questions address both occupational therapy and physical therapy practice. Please be aware that the regulation of these professions is undertaken by two separate entities.

The Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board does not issue temporary licenses for occupational therapy or physical therapy licensees.

In response to your question regarding signature requirements, rule 4755-27-07 of the Ohio Administrative Code requires physical therapists and physical therapist assistants to use the letters PT or PTA immediately following the individual's name since this is the regulatory designation allowing practice. Academic degrees may then follow the regulatory credential. For example, a nametag or signature might read Pat Doe, PT, MS, OCS.

Rule 4755-7-10 outlines the appropriate credentials for occupational therapy licensees. Occupational therapy staff are required to use OTR/L or COTA/L if they are currently certified by the National Board for Certification in Occupational Therapy (NBCOT). They are not currently certified, the appropriate credential is OT/L or OTA/L. The Ohio Occupational Therapy Practice Act does not specify if the credential needs to immediately follow the licensee's name.

The Sections thank you for your correspondence and appreciate your understanding that it is your professional responsibility to remain current with professional standards. Please visit the Board's website ([www.otptat.ohio.gov](http://www.otptat.ohio.gov)) to review the Occupational Therapy and Physical Therapy Practice Acts and other information related to the regulation of occupational and physical therapy in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter (<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Occupational Therapy and Physical Therapy Sections*

**Jeffrey M. Rosa**  
Executive Director

JMR:dm

**Questions regarding AT Practice Laws**

Millward Mike [millward.mike@pctc.k12.oh.us]

**Sent:** Thursday, April 24, 2014 7:46 AM**To:** OTPTAT Board**Categories:** Blue Category

Good morning,

I am working closely with my hospital system in attempting to incorporate an improved role of ATs in the clinical setting. Several questions have come up, that we want to be sure we understand the laws accurately. Any information you can give would be greatly appreciated.

1) Are ATs allowed to perform manipulations in the state of Ohio, given the AT is trained in such treatments?

2) I hope I am reading this accurately ... ATs may bill using the same codes as PTs/PTAs, as long as there is direct (1-1) supervision. Does this mean that a PT may not be treating a different patient at the same an AT is treating a patient, if they are going to bill under the same codes (they are treating different patients)?

3) Do ATs documentation need to be co-signed by a PT?

Thank you again for your time, any help you could give would be greatly appreciated!!

Michael J. Millward AT, ATC, CSCS

Exercise Science - Sports Medicine Instructor

Pioneer Career and Technology Center

27 Ryan Rd.

Shelby, Ohio 44875

Office: 419.347.7744 x 42787

Fax: 419.347.4977

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JB Correspondence # 6Page 1Meeting Date: MAY 2014License #: AT.002760



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Governor  
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Executive Director  
*Jeffrey M. Rosa*

JB6  
May 2014

Michael Millward, AT  
Millward.mike@pctc.k12.oh.us

AT.002760

Dear Mr. Millward:

This letter is in response to your correspondence requesting clarification on the physical therapy and athletic trainers requirements regarding concussion management. Your question addresses both physical therapy and athletic training practice. Please be aware that the regulation of these professions is undertaken by two separate entities.

**In response to your first question**, while the Ohio Revised Code pertaining to athletic training does not specifically mention manipulation, care should be taken to ensure that section 4734.01 (practice of chiropractic defined) and 4734.14 (Prohibited Acts) of the revised code is not violated. The section is located below for your review.

#### 4734.01 Practice of Chiropractic Defined

As used in this chapter, the "practice of chiropractic" means utilization of the relationship between the musculo-skeletal structures of the body, the spinal column, and the nervous system in the restoration and maintenance of health, in connection with which patient care is conducted with due regard for first aid, hygienic, nutritional, and rehabilitative procedures and the specific vertebral adjustment and manipulation of the articulations and adjacent tissues of the body.

#### 4734.14 Prohibited acts.

(A) (1) Except as provided in division (B) of this section, no person shall engage in the practice of chiropractic without a current, valid license issued by the state chiropractic board under this chapter.

Pursuant to section 4755.60 (A) of the Revised Code and rule 4755-42-02 of the Administrative Code, athletic trainers must practice upon the referral of an individual licensed in Ohio to practice medicine and surgery, osteopathic medicine and surgery, podiatric medicine and surgery, chiropractic, dentistry, or physical therapy. Athletic trainers may not accept direct referrals from physician assistants or practitioners of the limited branches of medicine.

A referral relationship between a team physician and an athletic trainer should be one consisting of a protocol of care communicated between a team physician and the athletic trainer. This agreement should include procedures for prevention, recognition, assessment, management and treatment of athletic injuries.

If a situation exists where a patient referred to the athletic trainer by a physical therapist may benefit from athletic training services, i.e. a patient's condition is an athletic injury, then the physical therapist may refer that particular patient to an athletic trainer. If this procedure is followed, the athletic trainer must perform an injury assessment and determine the athletic training plan of care.

If the athletic trainer is providing services pursuant to a physical therapy plan of care, rule 4755-27-01 (C) of the Ohio Administrative Code applies. This rule defines "other licensed personnel" as "any person holding an Ohio license to practice as a health care practitioner in a profession other than physical therapy . . . who is working under the direct supervision of a physical therapist or physical therapist assistant, as delegated by the physical therapist, and is performing tasks and duties related to the delivery of physical therapy." When acting under the direction of a physical therapist, licensed athletic trainers are considered other licensed personnel.

**Comment [JMR2]:** Sue, I would argue that if you (the AT Board) say that manipulation is part of the AT scope, the provisions in the chiro law don't apply. They don't own the performance of manipulation. That being said, I have no idea if manipulation is something that ATs are educated/trained to do.



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In accordance with rule 4755-27-04 of the Administrative Code, the supervising physical therapist or physical therapist assistant is accountable and responsible at all times for the direction of the actions of the persons supervised, including other licensed personnel. A physical therapist assistant can provide direct supervision of other licensed personnel even if the physical therapist is not on-site but is available by telecommunication at all times and able to respond appropriately to the needs of the patient. However, only a physical therapist can determine that a patient may be delegated to other licensed personnel.

Other licensed personnel cannot be assigned their own physical therapy caseload without the supervising physical therapist or physical therapist assistant having direct contact with each patient during each visit. It is the responsibility of the physical therapist to determine and document the extent of contact necessary to assure safe patient care. Pursuant to rule 4755-27-03 (F) of the Ohio Administrative Code, "Delegation of tasks related to the operation and delivery of physical therapy to other licensed personnel must be done in accordance with the scope of practice of the other licensed personnel's professional license, education and training, the level of competence as determined by the supervising physical therapist, and in consideration of the patient's overall needs and medical status."

The patient contact by the delegating physical therapist or supervising physical therapist assistant may be to provide portions of treatment or to assess the patient's progress within the existing plan of care. When needed, only the physical therapist may make adjustments to the plan of care.

**In response to your second question**, relates to payer policies and not the Physical Therapy Practice Act, The Physical Therapy section recommends that you prefer to Medicare rules or other payer policies about reimbursement for treatment by other licensed personnel since some insurers do not cover services other than those provided by a physical therapist or physical therapist assistant. You may also get information from the Reimbursement Department or Ohio chapter of the APTA.

Nothing in the Ohio Athletic Training Practice Act prevents athletic trainers from billing for services. However, employers may restrict your practice due to billing or other protocol issues. The Athletic Trainers Section suggests you contact the Ohio Athletic Trainers Association or the National Athletic Trainers Association or refer to CPT codes listed under physical medicine.

**In response to your third question**, the Physical Therapy Section does not dictate the format of clinical notes. As long as the documentation by other licensed personnel is restricted to an accounting of the activities provided, descriptions of those activities and the patient's comments may be in various sections of the documentation. The remainder of the documentation is the responsibility of the supervising physical therapist or supervising physical therapist assistant.

The rule limiting the documentation by other licensed personnel to "an accounting of the activities provided" is intended to include patient comments during those activities and a description of the patient's response or ability/inability to perform specific components of the program. However, any assessment of a patient's progress must be documented by the physical therapist or physical therapist assistant, and prognosis or plan revision must be documented by the physical therapist.

The signature of other licensed personnel may reflect their training or credentials, but must be countersigned by the supervising physical therapist. The countersignature must indicate that the supervising physical therapist reviewed the written note. Only a hand written or electronic signature is acceptable.

When a patient is seen in a multidisciplinary facility, the professional who performs the initial evaluation must oversee that patient's care.



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For example, if a patient is referred for evaluation and treatment and an athletic trainer performs the initial evaluation, the patient is under athletic training care and guidelines. If the patient is initially seen by a physical therapist, the patient would be a physical therapy patient and fall under their guidelines. The prescription by the referring medical practitioners must state that the referral is for athletic training. The physical therapist may also refer the patient to the care of the athletic trainer but have the patient still remain under the care of the physical therapist. If the patient is receiving services pursuant to an athletic training referral, the athletic training functions independently and does not need supervision or co-signature by the physical therapist.

The Sections thank you for your correspondence and appreciate your understanding that it is your professional responsibility to remain current with professional standards. Please visit the Board's website ([www.otptat.ohio.gov](http://www.otptat.ohio.gov)) to review the Athletic Training and Physical Therapy Practice Acts and other information related to the regulation of athletic training and physical therapy in Ohio. You can also obtain updates from the Board at our Facebook (<http://www.facebook.com/OhioOTPTATBoard>) and Twitter (<http://www.twitter.com/OhioOTPTATBd>) pages. Should you have any additional questions, please contact the Board at (614) 466-3774 or via e-mail at [board@otptat.ohio.gov](mailto:board@otptat.ohio.gov).

Sincerely,  
*The Physical Therapy and Athletic Trainers Sections*

**Jeffrey M. Rosa**  
Executive Director

JMR:dm

# Ethics in Action: Case Study Deliberations in Athletic Training

OT, PT, AT Board – AT Section

Aaron Galpert, Brian Hartz,

Kimberly Peer, Jeff Rosa,

Susan Stevens

*OATA MAY 2014*

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# OBJECTIVES

- Identify the challenges associated with integration of ethics in all aspects of athletic training;
  - Formulate strategies evaluating ethical dilemmas to promote reflection; and,
  - Encourage discussion to review ethical dilemmas and their impact on professional practice
-

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## WHAT TO EXPECT...

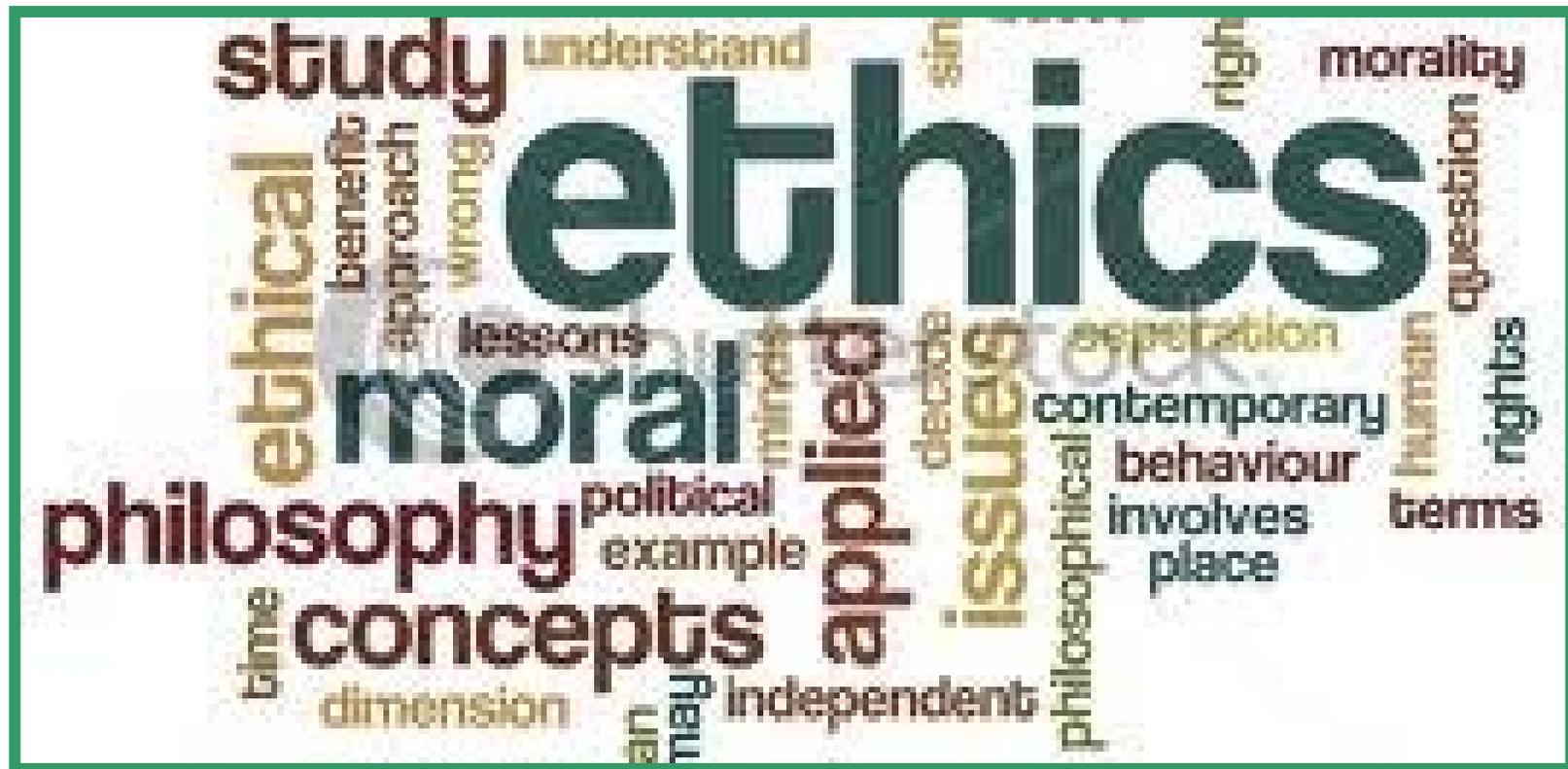
- Discussion between participants
  - Game Plan
    - Brief discussion and **ENGAGING CONVERSATION**
-

---

# Clinical Decision Making



# WHAT EXACTLY IS ETHICS?



---

# ETHICS DEFINED

- ▣ "What is right...what is good"
  
  - ▣ Trilogy (Kidder, 2003)
    - ▣ Values
    - ▣ Moral Reasoning and Ethical Decision Making
    - ▣ Moral Courage
-

---

# WHY TALK ABOUT ETHICS?

- ▣ Deepens our reflection on the ultimate questions in life
  - ▣ Helps us to think better about morality and the choices we make
  - ▣ Sharpens our general thinking and our ability to reason and defend
-

---

# IS DOING YOUR BEST THE FOUNDATION?

- ▣ Who defines “the best”
  - ▣ How is “the best” defined?
  - ▣ Is intent important to ethics?
  - ▣ Is it situational?
-

---

## SO WHAT IS THE GOAL?

*“Although this may sound odd, the purpose of ethics is not to make people ethical, it is to help people make better decisions.”*

*– Brown, 1990, xi.*

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# Ethics is about choices

- ▣ What we choose to do intentionally
  - ▣ Omissions count; Failure to act counts
- ▣ Not every choice is ethically significant

# Ethics is about evaluation

- ▣ Determinations and judgments about values
- ▣ Right: Right/Right: Wrong
- ▣ Character traits support moral principles
  - ▣ Support in moments of trial when tempted to act contrary to principles
  - ▣ Support us when 2 principles conflict
  - ▣ Sustain us when trying to revise rules relative to duty
  - ▣ Allow us to recognize excuses and extenuating circumstances

---

# Ethics is normative

- ▣ Rooted in the fact that there are good beliefs, behaviors, and ways of reasoning morally and that there are bad beliefs, behaviors, and ways of reasoning morally

---

# Ethics includes reasoning

- ▣ How we determine what is truly good and truly bad for ourselves
  - ▣ Difficult because:
    - ▣ Some things seem good for us but are really not
    - ▣ Good is often mixed with bad
    - ▣ Figuring out what is good and bad is distorted by personal, social and psychological bias.
-

- 
- 
- ▣ You must be clear about your own values
  - ▣ You must understand the professional values
  - ▣ You must consider if your actions reflect your values

**THIS REQUIRES REFLECTION AND EXAMINATION**

**(Duncan, 2010)**





**ETHICS IS LIKE AN ONION**

---

# UNDERSTANDING ETHICAL & PROFESSIONAL RESPONSIBILITY

- ▣ Ability to make informed ethical choices
  - ▣ Knowledge of professional codes of ethics
  - ▣ Evaluates the ethical dimensions of professional practice
  - ▣ Demonstrates Ethical Behavior
-

---

# Right versus Wrong

- ▣ Three ways to be Wrong
  - ▣ Violation from Law
  - ▣ Departure from the Truth
  - ▣ Deviation from Moral Rectitude
    - ▣ Your Inner Core
    - ▣ Actions out of Sync with your Core

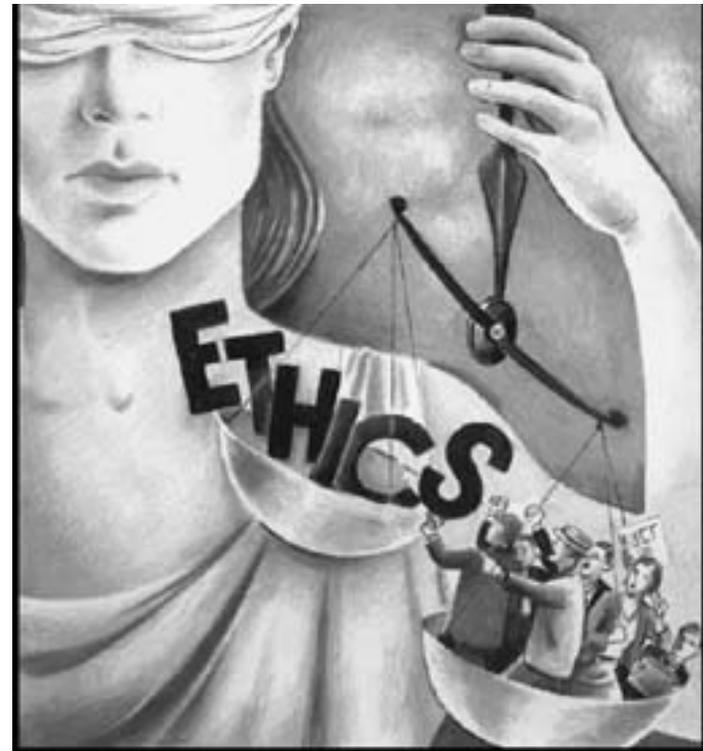
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# Right versus Right

- ▣ Don't always involve criminal law or professional codes
- ▣ Where one moral value is pitted against another moral value

# ISN'T IT ABOUT THE LAW?

<p><b>Legal Unethical</b></p>	<p><b>Legal Ethical</b></p>
<p><b>Illegal Unethical</b></p>	<p><b>Illegal Ethical</b></p>



---

# RULES OF PROFESSIONAL MORALITY

- ▣ Vague
- ▣ Open to Interpretation
- ▣ Lead to Ethical Dilemmas
  - ▣ Obligations demand action

---

# Professional Obligations & Standards



---

## *The artistry of professional practice*

*....Unfolds as professionals consciously grapple with those gray areas of professional practice in which the precise direction to be taken is not clear because the situation is shrouded in moral ambiguity, value conflicts, and ethical dilemmas.*

*P. Clark*

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# KEY FACTORS IN ETHICAL DILEMMAS

- ▣ **Information**
  - ▣ **Public Exposure and Reputation**
  - ▣ **Personal Loss**
-

## *Case Review*

- 1. Use the Ethical Analysis Worksheet to move through the case*
- 2. Reach consensus on how your group would resolve the case*



GOT  
ETHICS ?

- 
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- ▣ **CASE I:** An athlete with a concussion is the starting shortstop for a baseball team. The concussion is mild yet is still causing considerable headache. A major game is pending and the parents are pushing to allow the athlete to play. Their neighbor, a cardiologist, says he will sign off for him to play.
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- **CASE 2:** As a young professional in your first job, you are faced with the challenge of working with a team of far more experienced clinicians than you. Part of this challenge is that, based on your formal educational program, you observe what you believe to be breeches in professional behaviors relative to the articulated code of ethics for your profession. One of the most disturbing behaviors you observe involves “derogatory comments about patients, their history, their injury/condition, and/or their family situation.” Is this unethical behavior?
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- ▣ **CASE 3:** You work for a private outpatient clinic. A worker who was recently injured is nearing time to return to his job. His progress has been fair, but it certainly falls within the marginal range. He has shared with you that during his time off he has been able to help his elderly father care for his mother, who has Alzheimer's disease. He is always on time to the clinic and works hard during his rehabilitation. He states that his father cannot afford to institutionalize his mother and his help creates some relief from the situation. You are writing the report for his follow-up visit for the physician, which will determine whether he returns to work the next week or has his therapy extended another 3 weeks. You know the physician will ask what you think about his readiness to return to work. What is the RIGHT THING to do?

- ▣ **CASE 4:** An athlete needs a bone scan for a suspected femoral stress fracture. She is unable to return to play until she receives clearance, which will be based on the scan results. You receive the referral from the team physician and have set up an appointment and transportation to the appointment for the athlete. On the morning of the scan, the athlete calls to cancel the appointment 30 minutes before you are to leave to take her there. You reschedule the appointment for the following day; this time the athlete fails to show. When you see her that afternoon, she laughs and said she must have forgotten and asks you to reschedule the appointment. This time when you call to reschedule, you are given an appointment time 1 week away. You typically try to see if the bone scan staff can “squeeze you in sooner,” but you do not ask for that favor this time. Is this ethical?

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- **CASE 5:** As an athletic trainer employed at a clinic, you receive a card that reflects the top five reimbursable codes for therapy services at your clinic. You are told that your reimbursable charges will determine the amount of bonus you receive for the year. Each week at the staff meeting, the boss updates everyone as to the status of the reimbursed levels and who is in the lead relative to anticipated bonus amounts. What do you do?



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# FIVE MINDS FOR THE FUTURE

## (Gardner, 2007)

- ▣ **Disciplined Mind**

- ▣ A Decade

- ▣ Lifelong Learning & Multi-Disciplinary

- ▣ **Synthesizing Mind**

- ▣ “...the mind that can survey a wide range of sources, decide what is important and worth paying attention to, and then put this information together in ways that make sense to oneself and, ultimately, to others as well.”

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- Creating Mind
    - Knowledge, Personality and Temperament
  - Respectful Mind
    - Threatened by Intolerance, Ignorance, and Prejudice

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# Ethical Mind

- ▣ Who Do I Want To Be?
- ▣ How Do I Want to Contribute to the World, Society, or Profession?

“We are responsible not only for what we do but for what we don’t do.”

- ▣ Jean-Baptiste Molière
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# It is a journey.....

“Discovery consists of looking at the same thing as everyone else and thinking something different”

**A-Szent-Gyorgyi**

“Destiny is not a matter of chance, it is a matter of choice” -

**W.J. Bryan**

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▣ Thank You...

It has been a privilege

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**\*\*\*DRAFT - NOT FOR FILING\*\*\*****4755-43-12 Military provisions related to licensure.**(A) Definitions.(1) "Armed forces" means:

- (a) The armed forces of the United States, including the army, navy, air force, marine corps, and coast guard;
- (b) A reserve component of the armed forces listed in paragraph (A)(1)(a) of this rule;
- (c) The national guard, including the Ohio national guard or the national guard of any other state;
- (d) The commissioned corps of the United States public health service;
- (e) The merchant marine service during wartime; or
- (f) The Ohio organized militia when engaged in full-time national guard duty for a period of more than thirty days.

(2) "Member" means any person who is serving in the armed forces.(3) "Veteran" means any person who has completed service in the armed forces, who has been discharged under honorable conditions or who has been transferred to the reserve with evidence of satisfactory service.(B) Eligibility for licensure.

In accordance with section 5903.03 of the Revised Code, a veteran or member of the armed forces may submit documentation for the board's consideration to demonstrate that the applicant's military education, training, and/or service is substantially equivalent to the educational and experience requirements for licensure as an athletic trainer.

(C) License renewal.(1) In accordance with section 5903.10 of the Revised Code, a licensee whose license expired due to the licensee's service in the armed forces shall be eligible for renewal of the expired license in accordance with section 4755.63 of the Revised Code and rules 4755-43-08 and 4755-47-06 of the Administrative Code, if the following conditions are met:

- (a) The licensee presents the board with satisfactory evidence that, not more than six months prior to the date the evidence is submitted to the board, the licensee was honorably discharged or separated under honorable conditions;
- (b) The licensee is not suffering a mental or physical illness, including physical deterioration that adversely affects cognitive, motor, or perception skills, that affect the licensee's ability to practice according to acceptable and prevailing standards of care; and
- (c) The licensee meets the requirements for license renewal required by section 4755.63 of

**\*\*\*DRAFT - NOT FOR FILING\*\*\***

the Revised Code and rules 4755-43-08 and 4755-47-06 of the Administrative Code.

(2) The provisions of paragraph (C) of this rule also apply if the licensee's spouse served in the armed forces and the spouse's service resulted in the licensee's absence from this state.

(D) Continuing education.

(1) In accordance with section 5903.12 of the Revised Code, the provisions of this paragraph apply to a licensee who has been a member of the armed forces who has served on active duty for a period in excess of thirty-one days.

(2) A licensee who meets the provisions contained in paragraph (D)(1) of this rule may submit an application to the Board requesting an extension of the current continuing education reporting period.

(a) The licensee shall submit proper documentation certifying the active duty service and the length of that active duty service.

(b) Upon receiving the application and proper documentation, the board shall extend the current continuing education reporting period by an amount of time equal to the total number of months that the licensee spent on active duty during the current continuing education reporting period. Any portion of a month served shall be considered one full month.

(E) Determining fulfillment of continuing education.

(1) In accordance with section 5903.121 of the Revised Code, the board shall consider relevant education, training, or service completed by a licensee as a member of the armed forces in determining whether a licensee has met the continuing education requirements needed to renew the license.

(2) For the board to consider relevant education, training, or service completed by the licensee in accordance with paragraph (E) of this rule, the licensee shall submit a request for consideration and documentation of the education, training, or service to the board at least ninety days prior to the expiration of the license.

(F) Waiver of license application fee.

(1) The application fee shall be waived for an applicant who is a current member of the armed forces.

(2) Paragraph (F) of this rule applies to the following application fee types:

(a) Initial licensure by examination, outlined in rule 4755-47-04 of the Administrative Code.

(b) Initial licensure by endorsement, outlined in rule 4755-47-04 of the Administrative Code.

(c) Reinstatement of an expired license, outlined in rule 4755-7-05 of the Administrative Code.

**\*\*\*DRAFT - NOT FOR FILING\*\*\***

(G) Application process.

- (1) The board's applications shall include a question to identify if the applicant is a member of the armed forces, a veteran, or a spouse or surviving spouse of a member of the armed forces or veteran. This status shall be stored in the licensing system.
- (2) When the board receives an application from an individual identified in paragraph (G)(1) of this rule, the processing of that application shall be prioritized, with a goal of ensuring that a license is issued the same day that the application is complete.



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**Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board**

77 South High Street, 16<sup>th</sup> Floor  
Columbus, Ohio 43215-6108

Governor  
*John R. Kasich*  
Executive Director  
*Jeffrey M. Rosa*

TO: Mark Hamlin, Director of Regulatory Policy

FROM: Jeffrey M. Rosa, Executive Director

DATE: April 28, 2014

SUBJECT: Memorandum of Response to CSI Review – 2014 AT Military Considerations

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On April 15, 2014, the Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board (“Board”) received the Common Sense Initiative Office’s Recommendation Memorandum (“CSI Recommendation”) for the 2014 AT Military Considerations (OAC 4755-43-12) rule package. The Board appreciates the timely issuance of this memo.

The CSI Recommendation stated that “For the reasons discussed above, the CSI Office has no recommendations regarding this rule package.” The CSI Recommendation also stated that “Based on the above comments, the CSI Office concludes that the Board should proceed with the formal filing of this rule package with the Joint Committee on Agency Rule Review.”

At this time, the Board will continue moving forward with its filing of this rule package with the Joint Committee on Agency Rule Review.

If you have any questions, please do not hesitate to contact me at 614-466-3474 or [jeff.rosa@otptat.ohio.gov](mailto:jeff.rosa@otptat.ohio.gov).



## MEMORANDUM

**TO:** Jeff Rosa, Executive Director, Ohio OTPTAT Board  
**FROM:** Paula Steele, Regulatory Policy Advocate  
**DATE:** April 15, 2014  
**RE:** **CSI Review – 2014 AT Military Considerations (OAC 4755-43-12)**

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On behalf of Lt. Governor Mary Taylor, and pursuant to the authority granted to the Common Sense Initiative (CSI) Office under Ohio Revised Code (ORC) section 107.54, the CSI Office has reviewed the abovementioned administrative rule package and associated Business Impact Analysis (BIA). This memo represents the CSI Office's comments to the Agency as provided for in ORC 107.54.

### **Analysis**

This rule package consists of a single new rule being proposed by the Ohio Occupational Therapy, Physical Therapy, & Athletic Trainers (OTPTAT) Board to implement the recently enacted House Bill 98 which requires each licensing board to adopt rules identifying substantial military equivalents for its licensing education and experience requirements. This rule package, along with one each for occupational and physical therapists was submitted to the CSI Office on March 14, 2014 with the comment period ending on April 4, 2014. One comment was received during that time and was in favor of all the new rules.

The rule defines armed forces and military veterans, and addresses eligibility for licensure, license renewals for those serving in the armed forces or a licensee whose spouse served in the armed forces, and continuing education and fee waivers for members of the armed forces. Unlike the proposed rules for the occupational and physical therapists, this rule does not articulate military equivalents that are equal to or exceed the educational and experience requirements for licensure for athletic trainers. No such equivalencies were identified by the Board.

In addition to implementing House Bill 98, the proposed rule implements recommendations

stemming from Executive Order 2013-05K, which are summarized in the Office of Workforce Transformation's *Valuing Ohio Veterans Report* as follows:

The State of Ohio recognizes veterans as a valuable, talented and skilled workforce, and to that end is committed to increasing the number of military service members and veterans living and working in Ohio.

In June of 2013, Governor John R. Kasich signed Executive Order 2013-05K to support Ohio's veterans by ensuring they are receiving the appropriate credit and credentialing for their military training and experience.

A public comment in response to the occupational therapists rule and applicable to this proposed rule, suggested the U.S. Public Health Service be included in the definition of the armed services. The Board responded that subsequent to the draft of the proposed rule, the State has expanded the definition to include the U.S. Public Health Service. Therefore, the Board will revise the proposed rule(s) accordingly prior to filing with the Joint Committee on Agency Rule Review

After reviewing the proposed rule and BIA, the CSI Office has determined that the rule package satisfactorily meets the standards espoused by the CSI Office, and the purpose of the rules justifies the adverse impact identified in the BIA.

### **Recommendations**

For the reasons described above, the CSI Office has no recommendations regarding this rule package.

### **Conclusion**

Based on the above comments, the CSI Office concludes that the Board should proceed with the formal filing of this rule package with the Joint Committee on Agency Rule Review.

cc: Mark Hamlin, Lt. Governor's Office