



STATE OF NEVADA  
BOARD OF OCCUPATIONAL THERAPY

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NOTICE OF PUBLIC MEETING

July 19, 2025 – 9:30 am

Board of Occupational Therapy  
Administrative Office  
6170 Mae Anne Ave., Suite 1  
Reno, NV 89523

Zoom Access:

<https://us06web.zoom.us/j/89874922659?pwd=UZRGqnHMYa3JCw1XopVPtYPcqZIQNM.1>

Meeting ID: 898 7492 2659

Passcode: 353839

Telephone Audio Only: (253) 215-8782

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AGENDA

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*Public comment is welcomed by the Board in writing or in person. Persons wishing to provide public comments remotely may access the meeting by telephone at (253) 215-8782 or through the electronic link posted on the agenda. Public comment will be limited to five minutes per person and comments based on viewpoint will not be restricted. Public comment will be available at the beginning of the meeting and as the last item on the agenda. At the discretion of the Chairperson, additional public comment may be heard when that item is reached. The Chairperson may allow additional time to be given a speaker as time allows at his/her sole discretion. (NRS 241.020, NRS 241.030)*

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The State of Nevada Board of Occupational Therapy may: (a) address agenda items out of sequence, (b) combine agenda items, and (c) pull or remove items from the agenda at any time. The Board may convene in closed session to consider the character, alleged misconduct, professional competence or physical or mental health of a person. (NRS 241.020, NRS 241.030) **Action** by the Board on an item may be to approve, deny, amend, or table.

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1. Call to Order, Confirmation of Quorum
  2. Public Comment

No vote may be taken upon a matter raised during a period devoted to public comment until the matter itself has been specifically included on an agenda as an item upon which action may be taken. (NRS 241.020)
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3. Approval of the Minutes (for possible action)

- May 3, 2025

4. Legislative Activities (informational)
- Legislative Status Report - Cartwright NV Government Affairs

5. Disciplinary Matter – Consideration of Consent Decree (for possible action)

Katherine Schweitzer, OT      License No. OT-3520      Case No. 25-03

Possible closed session for the Board to consider the character, alleged misconduct, professional competence or physical or mental health of a person (NRS 241.030)

6. Disciplinary Matter – Consideration of Consent Decree (for possible action)

Taryn Bergman, OTA      License No. OTA-3167      Case No. 25-04

Possible closed session for the Board to consider the character, alleged misconduct, professional competence or physical or mental health of a person (NRS 241.030)

7. Hearing for Determination of Violation of Disciplinary Order (for possible action)

Robert Porter, OTA      License OTA-3546      Case No. 25-05

Possible closed session for the Board to consider the character, alleged misconduct, professional competence or physical or mental health of a person (NRS 241.030)

8. Discussion, Review, and Approval of Fiscal Year 2026 Budget (for possible action)

9. Executive Director’s Report (for possible action)

10. Report from Deputy Attorney General (informational)

11. Board Activities & Reports from Members (for possible action)

- FY 2026 Meeting and Activities Schedule

12. Public Comment

No vote may be taken upon a matter raised during a period devoted to public comment until the matter itself has been specifically included on an agenda as an item upon which action may be taken. (NRS 241.020)

13. Adjournment (for possible action)

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Prior to the commencement and conclusion of a contested case or a quasi-judicial proceeding that may affect the due process rights of an individual the board may refuse to consider public comment. (NRS 233B.126)

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This meeting has been posted at the Board of Occupational Therapy Administrative Office, 6170 Mae Anne Ave., Reno, NV 89523, on the Board of Occupational Therapy website [www.nvot.org](http://www.nvot.org); and may also be accessed at the following websites: <https://notice.nv.gov/> - State of Nevada Public Notices

This agenda has been sent to all members of the State of Nevada Board of Occupational Therapy and other interested persons who have requested an agenda from the Board. Persons who wish to continue to receive an agenda and notice must request so in writing on an annual basis.

Supporting materials relating to this public meeting of the Board of Occupational Therapy are available on the Board website <a href="http://www.nvot.org">www.nvot.org</a> or by contacting the Board office at (775) 746-4101 or email <a href="mailto:board@nvot.org">board@nvot.org</a>
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<b>AGENDA ITEM 3: Approval of Minutes</b>
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The minutes of the meeting of May 3, 2025 of the State Board of Occupational Therapy are presented for approval.



## **STATE OF NEVADA BOARD OF OCCUPATIONAL THERAPY**

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### **SUMMARY MINUTES PUBLIC BOARD MEETING May 3, 2025**

Members Present: Christopher Liebl, Jocelyn Pereira, Chelsea Gonzalez,  
Scott Oakley

Members Absent: Philip Seitz

Staff Present: Heather Hartley, Executive Director  
Stacey Whittaker, Director of Licensing & Operations  
Henna Rasul, Senior Deputy Attorney General

Public Present: Lea Cartwright, Allen Espelita, Julia Graham, Kristen Neville, Matt Olivier,  
Sabrina Schnur

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#### **Call to Order, Confirmation of Quorum**

Chair Liebl called the Board meeting to order at 9:32 am. A roll call confirmed a quorum was present.

#### **Public Comments**

Chair Liebl called for public comments, there were none.

#### **Approval of Minutes**

Jocelyn Pereira made the motion, seconded by Chelsea Gonzalez, to approve the minutes of the meeting of March 29, 2025. The motion passed.

#### **Legislative Activities**

Lea Cartwright of Cartwright Nevada Government Affairs (formerly Belz & Case Government Affairs) provided a written Legislative Report with an update on the 2025 Legislative Session. As of the date of the meeting, there were 30 days left of the Legislative Session with a Second House Committee Passage deadline of May 16<sup>th</sup>. Senate Bill 78, a Governor's Priority Bill pertaining to Boards and Commissions, has passed through the first house without recommendation. Supplemental draft amendments to SB78 were issued by the Department of Business & Industry on April 30, 2025, and presented to the Board.

Lea mentioned a potential proposal from legislative Democrats to create an office of shared services instead of consolidating licensing boards. Other points of interest were a bill that would mandate a minimum 3-day meeting notice on the state public meeting website. The Board members did not have any additional questions or comments.

### **2025/2026 Strategic Direction Summary**

Executive Director Hartley presented the compiled Board Self-Assessment Summary. The questions centered around Board Member experiences, participation, expectations, and Board effectiveness. Two-year performance goals and initiatives were outlined as recommended by the Board Members.

Jocelyn Pereira made the motion, seconded by Chelsea Gonzalez to approve the Strategic Direction Summary. The motion passed.

Board Staff created and presented the first Semi-Annual Board Newsletter for review and approval.

Chelsea Gonzalez made the motion seconded by Jocelyn Pereira to approve and disseminate the newsletter as presented. The motion passed.

Executive Director Hartley then presented the revised staff retention incentive package options for Board review should SB78 pass through the Legislative Session. Vice Chair Seitz provided his feedback to Heather Hartley prior to the meeting and was in favor of Package B. The Board discussed the two options, and all agreed Package B was ideal with a tiered approach through the staffing transition period.

Scott Oakley made the motion, seconded by Chelsea Gonzalez, to approve Package B of the staff incentive options as presented. The motion passed.

### **Executive Director's Report**

Executive Director Hartley provided a report on licensure statistics, FY25 financial statements, Wells Fargo authorized signatories and investment account, Department of Business & Industry, legislative items, and an update on current complaints.

Jocelyn Pereira made the motion, seconded by Chelsea Gonzalez to approve the 3<sup>rd</sup> Quarter FY25 financials as presented. The motion passed.

### **Report from Deputy Attorney General**

Henna Rasul, Senior Deputy Attorney General, had no report.

### **Board Activities & Reports from Members**

Executive Director Hartley noted that the next Board Meeting will be held on July 19, 2025.

The Board revisited sending two representatives to the FARB (Federation of Associations of Regulatory Boards) conference in Denver, Colorado July 24-26, 2025. Ms. Hartley presented the estimated costs, including the registration fees, hotel rates, and flight expenses. The conference is budgeted for the next fiscal year, however there are concerns about the cash flow implications. Chair Liebl suggested sending just one representative based on the costs presented.

Jocelyn Pereira made the motion, seconded by Scott Oakley to approve sending Executive Director Hartley to the 2025 FARB Annual Conference pending final decision based on conference agenda and timing. The motion passed.

### **Public Comment**

Chair Liebl opened the floor for public comments, there were none.

**Adjournment** – Chair Liebl adjourned the meeting at 10:18 am.

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<b>AGENDA ITEM 4: Legislative Activities</b>
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**Legislative Report**

Lea Case of Cartwright NV Government Affairs will provide an update on legislative activities.

**Attachment**

Written Legislative Report

## **Nevada State Board of Occupational Therapy**

Legislative Report – July 8<sup>th</sup>, 2025

Submitted by Cartwright NV Government Affairs

### **Governor Actions**

Governor Lombardo [broke his own record](#), vetoing 87 bills following the end of the 2025 Legislative Session on June 2. He signed 518 bills into law, meaning approximately 1 in 7 bills that reached his desk did not become law. Combined with his 2023 numbers, he now holds the record for the most vetoes by any governor in Nevada's history.

Among the vetoed bills were proposals to expand reproductive healthcare and paid family leave, create a shield law for providers, and prohibit health insurers from using AI to deny prior authorization requests. In some cases, his veto messages cited concerns over unclear language or the broader message the legislation might send.

### **2025 Legislative Session**

This session, the Cartwright NV team watched 28 bills on behalf of the OT Board. Among the biggest topics was **board reform**:

[SB78](#), the daunting board bill that started discussions statewide during the last interim, was amended down and ultimately did not get a vote on the senate floor. A version proposed by Democrats in [SB425](#) would have allowed boards to voluntarily use services and share resources like tech support, accounting, and website management. That bill never made it out of Senate Finance. Similarly, [SB507](#), from the Senate Finance committee, would have allowed the Boards and Commissions office to set and collect a fee from licensing boards for professional services. SB507 passed out of the Senate on May 31<sup>st</sup> but did not have a hearing in the Assembly.

A last-minute revival of board consolidation concepts was introduced on May 30<sup>th</sup> from Assembly Minority Leader Greg Hafen. AB601 would have required periodic review of boards, oversee appointments, and provide administrative services. The bill never received a hearing. This means that no substantial changes to occupational licensing boards came from this session. Our team is confident the conversation has not ended yet, and we remain vigilant.

Here are a few bills that passed that impact or are of interest to the board:

[AB64](#): Makes minor changes to open meeting law, including, not requiring boards to host public meetings if they are *only* receiving legal advice from their attorney. This becomes effective October 1.



[AB106](#): Would have ratified the occupational therapy licensure compact. AB106 never made it out of ways and means because of \$70,000 [a fiscal note](#) from Business & Industry arguing they would lose licensee revenue and would need to enhance their data system. Only two compacts, of seven proposed, made it through this session: [AB163](#), for counselors, and [AB230](#), for speech-language pathologists.

[AB125](#): The Department of Administration will be required to post a schedule of public meetings online at least three working days, which is more than the daily schedule displayed on <https://notice.nv.gov>. This becomes effective October 1.

[AB484](#): Health care licensing boards have been required to collect certain data on licensure and renewal from licensees (race, ethnicity, languages spoken, practice area, etc.). AB484 expands the types of questions asked to include information about telehealth practice, the sex of the licensee, and the populations of patients they see.

[AB506](#): Repeals the requirement to submit a report to the Interim Finance Committee for 20 various entities. These mostly relate to education, contractors, and gift money received by state agencies for health care. Section 7 removes the requirement for boards to submit reports on the use of consultants.

[SB113](#): Occupational and physical therapists can now designate a person with a disability for the purposes of receiving a special license plate. This becomes effective October 1.

[SB274](#): Section 3 of SB274 removes the requirement for a regulatory board to submit quarterly information to the LCB on the petitions for review of criminal history by prospective applicants.

### **Interim Activities**

Although board reform failed legislatively, a significant structural change occurred in the executive branch: the Department of Health and Human Services has been reorganized, with Medicaid responsibilities transferred to a new agency, the Nevada Health Authority (NHA). The NHA also now oversees PEBP and other state healthcare purchasing programs. This consolidation is expected to improve Nevada's ability to negotiate healthcare pricing and manage costs.

A special legislative session is anticipated following the signing of the federal "One Big Beautiful Bill," which is expected to reduce federal funding to Nevada across major programs, including Medicaid. Once state fiscal analysts assess the impact, lawmakers will likely be called to rebalance the state budget.

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<b>AGENDA ITEM 5: Disciplinary Matter – Consent Decree</b>
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Katherine Schweitzer, OT      License No. OT-3520      Case No. C25-03

The Board will consider approval of a Consent Decree in Case C25-03 – Katherine Schweitzer, OT.

The Board may approve the Consent Decree, approve with revisions or not approve the Consent Decree and set a date for Hearing in the case.

The Consent Decree will be provided immediately prior to the meeting under separate cover.

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<b>AGENDA ITEM 6: Disciplinary Matter – Consent Decree</b>
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Taryn Bergman, OTA

License No. OTA-3167

Case No. C25-04

The Board will consider approval of the Consent Decree in Case C25-04 – Taryn Bergman, OTA.

The Board may approve the Consent Decree, approve with revisions or not approve the Consent Decree and set a date for Hearing in the case.

The Consent Decree will be provided immediately prior to the meeting under separate cover.

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<b>AGENDA ITEM 7: Determination of Violation of Disciplinary Order</b>
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Robert Porter, OTA

License No. OTA-3546

Case No. C25-05

Robert Porter appeared before the Board at their meeting on August 24, 2024 for consideration of application of license. The Board approved the issuance of a Nevada OTA license to Robert Porter with probation for two (2) years and the terms and conditions as indicated in the disciplinary order.

A Supervisory Audit was conducted on April 30, 2025. Board staff was informed on May 15, 2025 that Robert Porter's Supervising OT and employment had terminated on March 14, 2025.

Board staff contacted Highland Manor of Fallon Rehabilitation to receive a second confirmation of employment dates for Robert Porter. An email response indicating that Robert was employed from December 16, 2024 to March 14, 2025.

On May 29, 2025, Robert Porter was sent the Notice of Disciplinary Hearing Letter. Robert responded to the email indicating receipt of the notice and that he was unaware of the need to contact the Board regarding his change in employment as he did not quit. Robert stated that he was not terminated as he asked to take a break and not be scheduled until July 1<sup>st</sup> due to a family matter. Robert also indicated that this was discussed with his supervisor, and he plans to reach out at the end of June to see if he is needed.

Board staff conducted further investigation to discover that Robert Porter was employed with Highland Manor of Fallon in a PRN capacity as he did not have a set schedule but was scheduled as needed. Robert had not shown up for multiple shifts in March. Robert informed his supervisor that he no longer had availability to work at the facility for the foreseeable future. Robert was notified by his supervisor that he would be terminated due to resignation secondary to his change in availability. The facility administrator and on-site director of rehab were then notified of Robert's resignation.

As indicated in the Stipulated Settlement and Disciplinary Order;

7. Respondent shall notify the Board, in writing, within five (5) days of any change in employment status. Respondent shall notify the Board, in writing, within five (5) days if he is terminated from any occupational therapy or healthcare related employment with a full explanation of the circumstances surrounding the termination.

The Board may discuss and deliberate on the attached information and supporting documents to determine if the terms and conditions of the disciplinary order have been violated and if so, if further actions are warranted.

**Attachments**

**Email Correspondance**

**From:** [Sharon Bogan](#)  
**To:** [Nevada Board of Occupational Therapy](#)  
**Subject:** Re: Employment/Supervisory Audit  
**Date:** Tuesday, May 6, 2025 9:42:25 PM

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Both of them are no longer employed with Cottonwood Healthcare.  
Sent from my iPhone

On May 6, 2025, at 09:24, Nevada Board of Occupational Therapy  
<[board@nvot.org](mailto:board@nvot.org)> wrote:

Good Morning Sharon,

Thank you for updating your supervisory information online.

Do you know if these two OTA's (Porter and [REDACTED]) are still employed by the agency or was it just a supervisory change?

**Stacey Whittaker, Director of Licensing & Operations**

**State of Nevada Board of Occupational Therapy**

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**From:** Sharon Bogan [REDACTED]  
**Sent:** Thursday, May 1, 2025 1:20 PM  
**To:** Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)>  
**Subject:** Re: Employment/Supervisory Audit

Yes, I have been unable to login.  
I'm not sure what the issue is.

Sent from my iPhone

On May 1, 2025, at 12:19, Nevada Board of Occupational Therapy  
<[board@nvot.org](mailto:board@nvot.org)> wrote:

Thank you Sharon for the prompt response, can you please clarify the following:

When you say "terminated" does that mean their employment was

terminated or your supervision of them terminated?

Keep in mind that per NAC640A, all employment/contact/supervisory information must be updated to the board within 30 days of change.

If you have difficulties online, let us know and we are happy to assist you in updating your records.

**Stacey Whittaker, Director of Licensing & Operations**

**State of Nevada Board of Occupational Therapy**

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**From:** Sharon Bogan [REDACTED]

**Sent:** Wednesday, April 30, 2025 1:02 PM

**To:** Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)>

**Subject:** Re: Employment/Supervisory Audit

I need to change this.

I am still employed as a PRN with Reliant.

Cottonwood bought the building that I work in and went in house in August.

[REDACTED] terminated in October and Robert terminated in March I believe.

I will go to the website and make those changes.

Thank you for reaching out to me

Sent from my iPhone

On Apr 30, 2025, at 11:10, Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)> wrote:

Good Morning Sharon,

The Board is conducting an employment and supervisory audit and wanted to confirm with you the following information:

Your current employer on file is **Reliant Rehabilitation** out of Plano TX.

Your supervisory record shows that you are currently supervising [REDACTED] and **Robert Porter, OTA** at Highland Manor SNF.

Are these two organizations owned by Reliant Rehabilitation and are you still supervising these two OTA's?

Thank you for your time, please let us know if any of the aforementioned information needs to be updated.

**Stacey Whittaker, Director of Licensing & Operations**  
**State of Nevada Board of Occupational Therapy**  
6170 Mae Anne Avenue, Suite 1, Reno, NV 89523  
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On Thu, May 15, 2025 at 2:26 PM Nevada Board of Occupational Therapy  
<[board@nvot.org](mailto:board@nvot.org)> wrote:

Hi Sharon,

Thank you for the email. Yes, I have your email response regarding Robert Porter. You are correct, I am looking for a written confirmation from HR with an explanation. May I please have the HR person's contact information.

Thank you for your assistance with this matter.

Sincerely,

**Heather Hartley, Executive Director**

**State of Nevada Board of Occupational Therapy**

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**From:** Rehab Director [REDACTED]  
**Sent:** Thursday, May 15, 2025 11:49 AM  
**To:** Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)>  
**Subject:** Robert Porter Employment

Good Morning

I received a message that you are confirming Robert's employment

HR informed our receptionist to have me confirm as it is "therapy"

I have previously provided this information on my account, so I am not sure if I should be the one to confirm. Please let me know if you want a second person such as our HR to confirm Robert's employment.

Start Date: December 16, 2024.

End Date: March 14, 2025.

Please let me know if you need any other information.

Thank you

--

Sharon Bogan, OTR/L

Director of Rehab

MOCA Certified Rater

Highland Village of Fallon

550 N Sherman St

Fallon, NV 89406

**From:** [Business Office Manager](#)  
**To:** [Nevada Board of Occupational Therapy](#)  
**Subject:** Re: Employment Verification  
**Date:** Wednesday, May 21, 2025 9:38:20 AM

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Hello,

Robert Porter dates of employment are: 12/16/2024-3/14/2025. He resigned from his position.

Thank you,

***Teenah Beland***

Business Office Manager  
Highland Manor of Fallon Rehabilitation  
550 N. Sherman Street  
Fallon, NV 89406

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On Wed, May 21, 2025 at 9:22 AM Nevada Board of Occupational Therapy  
<[board@nvot.org](mailto:board@nvot.org)> wrote:

Hello Teenah,

Thank you for your response. There is not a form. In an email, please provided dates of employment and if he was terminated pleased provide an explanation.

Thank you,

**Heather Hartley, Executive Director**

**State of Nevada Board of Occupational Therapy**

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**From:** Business Office Manager [REDACTED]  
**Sent:** Wednesday, May 21, 2025 8:52 AM  
**To:** Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)>  
**Subject:** Re: Employment Verification

Hello,

Is there a form that needs to be filled out? I'm not seeing one attached.

Thank you,

***Teenah Beland***

Business Office Manager

Highland Manor of Fallon Rehabilitation

550 N. Sherman Street

Fallon, NV 89406

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On Tue, May 20, 2025 at 5:06 PM Nevada Board of Occupational Therapy  
<[board@nvot.org](mailto:board@nvot.org)> wrote:

Hello Teenah,

Please provide an employment verification for Robert Porter, OTA. If he was terminated, please provide an explanation for the termination. This matter is time sensitive so please respond as soon as possible.

Thank you,

**Heather Hartley, Executive Director**

**State of Nevada Board of Occupational Therapy**

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**From:** [Elvis Presley](#)  
**To:** [Nevada Board of Occupational Therapy](#)  
**Subject:** Re: Notice of Disciplinary Hearing  
**Date:** Thursday, May 29, 2025 5:28:45 PM

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I was an at will employee at Highland Manor Fallon NV. 550 Sherman Street. My notes were signed by Sharon Bogan OTR DOR. I last spoke to Dakota Belliston VP operations on Monday March 17. We discussed my position. He asked if I would be returning to work. I relayed to him my need to take some time off. And said I would let him know when available. But likely not til July 1. I did not mention my 8 year old son was flying in from the Philippines in 10 days. He had been there for 3 years for care due to illness. I volunteered to watch him. As his mom and I did not know if he would be able to stay out of emergency room and in school. We figured we should have a plan. It was me. I did not feel it was anyone's business about my son's medical issues. So I did not mention it to Dakota when we spoke on the 17th. I fully planned on checking in around July. If things went well with my son. They have. He plays soccer with some difficulty. And his mom has not lost her Rn job UC Davis like she nearly did. 3 Years ago. I appreciate you trying to understand .

Robert

On Thu, May 29, 2025 at 4:30 PM Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)> wrote:

Hello Mr. Porter,

Thank you for responding so quickly. I have received evidence to the contrary regarding your employment. Please confirm/ provide the following information.

- The location of your employment
- Full name of your OT Supervisor
- Full name and job title of Dakota

Thank you for your assistance with this matter.

Sincerely,

**Heather Hartley, Executive Director**

**State of Nevada Board of Occupational Therapy**

[6170 Mae Anne Avenue, Suite 1, Reno, NV 89523](#)

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**From:** Elvis Presley [REDACTED]  
**Sent:** Thursday, May 29, 2025 2:53 PM  
**To:** Nevada Board of Occupational Therapy <[board@nvot.org](mailto:board@nvot.org)>  
**Subject:** Re: Notice of Disciplinary Hearing

Received, thank you. I would like to state I was unaware that I needed to contact the board. I did not quit. And was not terminated. I asked to take a break and not be put on the schedule. Until the 1st of July. I have a child with medical issues. I am his caretaker. The last time I spoke to Dakota my supervisor that is what was discussed. I hoped to be able to call him the end of June to see if I am needed. Sincerely. Robert Porter

On Thu, May 29, 2025 at 2:15 PM Nevada Board of Occupational Therapy  
<[board@nvot.org](mailto:board@nvot.org)> wrote:

Hello Mr. Porter,

Please find attached the Notice of Disciplinary Hearing. The notice letter has also been mailed to your address on record. Please let me know if you have any questions.

Sincerely,

**Heather Hartley, Executive Director**

**State of Nevada Board of Occupational Therapy**

[6170 Mae Anne Avenue, Suite 1, Reno, NV 89523](#)

775.746.4101 P | 775.746.4105 F

**From:** [Dakota Belliston](#)  
**To:** [Nevada Board of Occupational Therapy](#)  
**Subject:** Robert Porter Information  
**Date:** Friday, May 30, 2025 11:27:02 AM  
**Attachments:** [Cottonwood Healthcare Mail - Robert Porter - Resignation.pdf](#)

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See attached requested information for Robert Porter in regards to his employment at Highland Manor of Fallon. Robert was employed with our facility in a PRN capacity meaning that he did not have a set schedule and was scheduled as needed. Robert did not show up for multiple shifts that he agreed to cover in March of 2025. When I spoke with Robert, he informed me that he no longer had any availability to assist with coverage at our facility for the foreseeable future. I let him know that we would terminate him due to resignation secondary to his change in availability. I let him know if anything changes to let me know and we could look at rehiring if needed. Immediately following this conversation I sent the attached email to the facility administrator and on-site director of rehab notifying them of Roberts resignation.

If you have any other questions please let me know.

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Best Regards,

***Dakota Belliston***  
*Vice President of Therapy Operations*  
Cottonwood Healthcare



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Dakota Belliston [REDACTED]

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## Robert Porter - Resignation

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Dakota Belliston [REDACTED]

Mon, Mar 17, 2025 at 1:19 PM

To: Trevor Miller [REDACTED] "rehab@fallonrehab.com" [REDACTED]

Robert Porter will be terminated secondary to resignation effective 3/14/25. I will work with HR at having this input into the system. Please plan accordingly.

Robert said he does not have any keys. He said all keys including the therapy gym were left in his room. He said he does not have any computers or any facility equipment that would need to be provided.

--

Best Regards,

**Dakota Belliston**

*Vice President of Therapy Operations*

Cottonwood Healthcare  
[REDACTED]

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**State of Nevada**  
**Board of Occupational Therapy**

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<b>AGENDA ITEM 8: Fiscal Year 2026 Budget</b>
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**Consideration of Fiscal Year 2026 Budget**

The FY 2026 budget is presented for review and approval. The budget will be revised with any necessary revisions based upon Board decisions or actions.

The Board may discuss and consider budgeting for continued education for Executive Director Hartley pertaining to attendance of conferences either in person out of state travel or virtually.

Reserve Funds Review - Per Board policy requirements, the Board will conduct an annual review of the reserve funds.

**Attachments**

Fiscal Year 2026 Proposed Budget  
Fiscal Year 2025/2026 Comparison  
Reserve Funds Analysis

# State of Nevada

## Board of Occupational Therapy

### Fiscal Year 2026 Budget

July 1 2025 - June 30 2026

BUDGET		2026
<b>Revenue</b>		
Application Fees	\$	44,660.00
Licensing Fees	\$	233,972.83
List / Verifications	\$	5,000.00
<b>Sub-total Licensing Fees</b>	<b>\$</b>	<b>283,632.83</b>
Interest Income	\$	500.00
Cost Sharing Income	\$	16,280.78
<b>Sub-Total Other Revenue</b>	<b>\$</b>	<b>16,780.78</b>
<b>Total Revenue</b>	<b>\$</b>	<b>300,413.61</b>
<b>Board Operations</b>		
<b>Personnel Expense</b>		
Executive Director	\$	97,846.50
Director Administration & Licensing	\$	43,170.86
Investigator	\$	1,750.00
Bonus/ Merit Increase Set Aside	\$	10,000.00
<b>Sub-Total Salary &amp; Wages</b>	<b>\$</b>	<b>152,767.36</b>
Employer Taxes	\$	11,686.70
Employer Paid Deferred Comp	\$	18,402.77
Medical Stipend	\$	1,800.00
Accrued PTO	\$	3,500.00
<b>Sub-Total Benefits</b>	<b>\$</b>	<b>35,389.47</b>
<b>Total Personnel Expense</b>	<b>\$</b>	<b>188,156.83</b>
<b>Operating Expense</b>		
Audit Fees	\$	-
Bank Fees - Merchant Svs	\$	7,000.00
Equipment Purchase	\$	-
Equipment Rental	\$	2,260.00
Insurance	\$	3,636.00
Legal Fees	\$	12,000.00
Licensing Data System	\$	9,150.00
Amortization / Subscription	\$	8,400.00
Technical Support	\$	750.00
Board Compensation	\$	4,500.00
Office Lease Expense	\$	35,056.18
Depreciation / Lease	\$	34,356.18
State Leasing Svs Assessment	\$	700.00
Office Supplies	\$	1,200.00
Dues and Subscriptions	\$	2,575.00
Office Expense	\$	3,630.00
Records Recycling	\$	130.00
Internet Service	\$	2,400.00
Postage & Mailing	\$	400.00
Telephone	\$	700.00
Professional Fees	\$	16,000.00
Bookkeeping Services	\$	4,000.00
Legislative Services	\$	12,000.00
Board Education / Planning	\$	5,000.00
Travel	\$	5,000.00
In State Travel	\$	2,500.00
Out of State Travel	\$	2,500.00
<b>Total Operating Expense</b>	<b>\$</b>	<b>102,007.18</b>
<b>Total Personnel and Operating</b>	<b>\$</b>	<b>290,164.01</b>
<b>Revenue Over / Under Expense</b>	<b>\$</b>	<b>10,249.60</b>

# State of Nevada

## Board of Occupational Therapy

**FY 26 / FY 25**

## Budget Comparison

BUDGET		2026	2025	Difference	
Revenue					
	Application Fees	\$ 44,660.00	\$ 44,000.00	\$ 660.00	
	Licensing Fees	\$ 233,972.83	\$ 230,515.10	\$ 3,457.73	1.50%
	List / Verifications	\$ 5,000.00	\$ 6,600.00	\$ (1,600.00)	
	Interest Income	\$ 500.00	\$ 11,000.00	\$ (10,500.00)	
	Cost Sharing Income	\$ 16,280.78	\$ 15,042.15	\$ 1,238.63	
				\$ -	
Total Revenue		\$ 300,413.61	\$ 307,157.25	\$ (6,743.64)	-2.20%
Operating Expense					
	Audit Fees	\$ -	\$ 9,600.00	\$ (9,600.00)	
	Bank Fees - Merchant Svs	\$ 7,000.00	\$ 7,000.00	\$ -	
	Equipment Purchase	\$ -		\$ -	
	Equipment Rental / Maintenance	\$ 2,260.00	\$ 2,100.00	\$ 160.00	
	Insurance	\$ 3,636.00	\$ 1,650.00	\$ 1,986.00	
	Legal Fees	\$ 12,000.00	\$ 12,000.00	\$ -	
	Licensing Software Program	\$ 9,150.00	\$ 8,950.00	\$ 200.00	
	Board Compensation	\$ 4,500.00	\$ 4,500.00	\$ -	
	Office Lease	\$ 35,056.18	\$ 34,466.00	\$ 590.18	
	Office Supplies / Dues & Subscriptions	\$ 3,775.00	\$ 3,280.00	\$ 495.00	
	Office Expense	\$ 3,630.00	\$ 3,530.00	\$ 100.00	
	Personnel Services	\$ 188,156.83	\$ 187,846.25	\$ 310.58	
	Professional Fees	\$ 16,000.00	\$ 37,500.00	\$ (21,500.00)	
	Travel - In State	\$ 2,500.00	\$ 2,500.00	\$ -	
	Travel - Out of State	\$ 2,500.00	\$ -	\$ 2,500.00	
	Board Education/Planning		\$ 3,000.00	\$ (3,000.00)	
Total Expense		\$ 290,164.01	\$ 317,922.25	\$ (27,758.24)	-8.73%
Net Revenue / Expense		\$ 10,249.60	\$ (10,765.00)		

	<b>Reserve Funds Analysis</b>		
	<b>As of June 30, 2025</b>		
Fund Balance	\$	347,895.03	
Deferred Rev	\$	273,163.75	
	<b>\$</b>	<b>621,058.78</b>	
<b>Set Asides</b>	<b>Contract balances</b>		
Albertson Consulting	\$	20,000.00	
Numbers Inc.	\$	3,000.00	
Belz & Case	\$	12,000.00	
Lease Obligations	\$	48,847.13	
Ricoh Lease	\$	6,407.64	
Pitney Bowes Lease		\$794.16	
<b>Total Set Asides</b>	<b>\$</b>	<b>91,048.93</b>	
Reserve Balance	\$	530,009.85	
2-year Operating	\$	580,328.02	
<b>Reserve &gt; 2 year</b>	<b>\$</b>	<b>(50,318.17)</b>	
<b>Monthly Reserve Analysis</b>			
\$ 530,009.85	Reserve Balance		
\$ 24,180.33	Operating / 24 Mo		
<b>21.9</b>	<b>Months Reserve For Operating</b>		

**State of Nevada**  
**Board of Occupational Therapy**

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<b>AGENDA ITEM 9: Executive Director's Report</b>
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**Executive Director's Report**

Heather Hartley will provide a report on Board Office Administrative Activities.

**Attachments**

Written Report  
FY 2025 Financial Reports  
4th Quarter Ending June 30, 2025  
Supervision Guidelines

**State of Nevada**  
**Board of Occupational Therapy**

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**EXECUTIVE DIRECTOR'S REPORT**  
**July 19, 2025**

**Licensure Statistics** - The following chart provides current and prior year licensing details and activity as of June 30, 2025. The number of practitioners increased by a net of 9 licenses in the fourth quarter.

**4th Quarter Statistics**

New Applications Received:	48	Licenses Issued:	48
Licenses Expired:	39	Licenses Renewed:	129

**Comparison to Prior Year at June 30**

Description	FY 2025	FY 2024	% +	OT's 2025	OT's 2024	OTA's 2025	OTA's 2024
Total Current Licensees	1844	1746	1%	1410	1337	434	409
Standard Licensees (active)	1777	1692	1%	1361	1299	416	393
Inactive Licensees	45	34		30	23	15	11
Inactive - Retired	9	10		8	8	1	2
Provisional Licensees	9	9		7	6	2	3
Temporary Licensees	4	1		4	1	0	0

**Fiscal Year 25 by Quarter**

Fiscal Year 2025	Total Licensees	OT	OTA
July 1, 2024	1746	1337	409
September 30, 2024	1795	1384	411
December 31, 2024	1821	1400	421
March 31, 2025	1835	1410	425
June 30, 2025	1844	1410	434

**FY 25 Financial Statements**  
**4th Quarter, Period ending June 30, 2025**

**FY 25 Budget vs Actuals - Period ending June 30, 2025** reflects a net income of \$13,864.28. Net operating income, revenue less expenses, is (\$14,726.21). With other income of \$28,590.45, the net overall income for the period is \$13,864.28.

**Licensing Revenue** - Licensing revenue is slightly above budget at 102.13%. Total License fees are at budget at 100.06%.

**Other Income** - Other income is 109.79% of the budget.

**Operating Expenses** - Expenses are under budget at 98.26%. Payroll budget is at 101.66% due to the award of bonuses not indicated in the original budget.

**Balance Sheet and Investments** - Total Cash as of June 30, 2025 was \$642,550.36; with \$642,550.36 in operating, \$0.00 in investments due to funds being moved into checking account. Total Equity is \$347,895.03.

**Wells Fargo** - The local branch is looking into the type of account the Board has with the potential of investing funds by purchasing CDs.

**Office Operations & Activities** - Correspondence has continued with NOTA regarding the conclusion of the legislative session. Staff have held monthly update meetings with Cartwright NV Government Affairs.

State reporting has been submitted to the Legislative Counsel Bureau (Disciplinary and Registration Report). As of July 1, the Board is no longer required to submit semi-annual Consultants Reporting.

**Department of Business and Industry** – The Deputy Director and one Analyst position will be funded through the State General Fund for FY 2026. There has been no correspondence with B & I post the legislative session. It is anticipated that quarterly profit and loss reports will still be required to submit for review.

**Legislative Items** - Bills of Interest of 83rd (2025) Session – AB 106 Assemblywoman Marzola ratified the Occupational Therapy Licensure Compact. The bill did not move any further this session. SB 34 The Nevada Patient Protection Commission (PPC) enacts Nevada to join five (5) Interstate Licensure Compacts. The bill did not get a hearing or make it out of committee passage. SB 78 did not move past Finance for review. The bill died towards the end of session. SB 507 proposed implementation of cost allocation to professional and occupational boards but was not passed by the legislature. SB 425 and AB 601 addressed board reform. The bills were presented towards the end of session, however did not move out of committees. SB113 approved PTs and OTs to the list of providers who can certify someone with a disability for a handicap license plate.

Bills of interest signed by the Governor included AB 64, AB 125, AB 484, AB 506, and SB 274.

**Big Picture/Albertson Consulting** - Board staff has a standing monthly update meeting. Big Picture has updated the database to now provide a direct link to disciplinary action documents on license verifications.

**Complaints Status** - There is currently one complaint in the investigation phase.



# State of Nevada Board of Occupational Therapy

## Balance Sheet

As of June 30, 2025

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Wells Fargo Bank - Checking	642,550.36
Wells Fargo Bank - Investments	0.00
Wells Fargo Bank - Money Market	0.00
<b>Total Bank Accounts</b>	<b>\$642,550.36</b>
Accounts Receivable	
Accounts Receivable	2,051.36
<b>Total Accounts Receivable</b>	<b>\$2,051.36</b>
Other Current Assets	
Prepaid Expenses	360.00
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$360.00</b>
<b>Total Current Assets</b>	<b>\$644,961.72</b>
Fixed Assets	
Net Fixed Assets	0.00
<b>Total Fixed Assets</b>	<b>\$0.00</b>
Other Assets	
Accum Depr - Right of Use Asset	-153,558.00
Accumulated Amortization of SAAS Asset	-13,582.00
Right of Use Asset	192,521.00
SAAS Asset	29,633.00
<b>Total Other Assets</b>	<b>\$55,014.00</b>
<b>TOTAL ASSETS</b>	<b>\$699,975.72</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	118.58
<b>Total Accounts Payable</b>	<b>\$118.58</b>
Credit Cards	
WF Mastercard	195.61

# State of Nevada Board of Occupational Therapy

## Balance Sheet

As of June 30, 2025

	TOTAL
<b>Total Credit Cards</b>	<b>\$195.61</b>
Other Current Liabilities	
Accrued PTO	9,579.82
Deferred Compensation Payable	206.39
Deferred Revenue	273,163.75
Direct Deposit Liabilities	0.00
Due to State Treasurer	0.00
Lease Liabilities - Current	32,498.00
Other Current Liabilities	0.00
Payroll Liability	5,966.13
Payroll Tax Liability	456.41
SAAS Liability - Current	7,293.00
<b>Total Other Current Liabilities</b>	<b>\$329,163.50</b>
<b>Total Current Liabilities</b>	<b>\$329,477.69</b>
Long-Term Liabilities	
Lease Liabilities - Non Current	13,934.00
SAAS Liability - Non Current	8,669.00
<b>Total Long-Term Liabilities</b>	<b>\$22,603.00</b>
<b>Total Liabilities</b>	<b>\$352,080.69</b>
Equity	
Invested in Capital Assets	-7,973.00
Retained Earnings	342,003.75
Net Income	13,864.28
<b>Total Equity</b>	<b>\$347,895.03</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$699,975.72</b>

# State of Nevada Board of Occupational Therapy

## Budget vs. Actuals FY25

July 2024 - June 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Income				
Fees	44,025.00	44,000.00	25.00	100.06 %
Fines and Legal Fees	3,376.36		3,376.36	
License Fees	234,869.92	230,515.10	4,354.82	101.89 %
List Fee	4,825.00	6,600.00	-1,775.00	73.11 %
<b>Total Income</b>	<b>\$287,096.28</b>	<b>\$281,115.10</b>	<b>\$5,981.18</b>	<b>102.13 %</b>
GROSS PROFIT	<b>\$287,096.28</b>	<b>\$281,115.10</b>	<b>\$5,981.18</b>	<b>102.13 %</b>
Expenses				
Attorney General / Legal Fees	6,941.16	12,000.00	-5,058.84	57.84 %
Audit fees	9,600.00	9,600.00	0.00	100.00 %
Bad Debt	732.32		732.32	
Bank Service/Merchant Charges	5,743.22	7,000.00	-1,256.78	82.05 %
Board Compensation	4,500.00	4,500.00	0.00	100.00 %
Board Education		3,000.00	-3,000.00	
Dues & subscriptions	2,761.64	2,080.00	681.64	132.77 %
Equipment Rental	1,851.88	2,100.00	-248.12	88.18 %
Insurance	2,096.05	1,650.00	446.05	127.03 %
Licensing - Data System	1,333.00		1,333.00	
Amortization	7,438.00	8,200.00	-762.00	90.71 %
Data System expense	6.33		6.33	
Data System Interest	1,016.00		1,016.00	
System Support	360.00	750.00	-390.00	48.00 %
<b>Total Licensing - Data System</b>	<b>10,153.33</b>	<b>8,950.00</b>	<b>1,203.33</b>	<b>113.45 %</b>
Meeting Expenses	65.00		65.00	
Office Expense	99.15		99.15	
Internet Service	1,923.21	2,400.00	-476.79	80.13 %
Postage and Delivery	736.69	300.00	436.69	245.56 %
Records Storage/Recycling	130.00	130.00	0.00	100.00 %
Telephone	628.39	700.00	-71.61	89.77 %
<b>Total Office Expense</b>	<b>3,517.44</b>	<b>3,530.00</b>	<b>-12.56</b>	<b>99.64 %</b>
Office Lease	2,125.00		2,125.00	
Depreciation	27,503.00	33,766.00	-6,263.00	81.45 %
Lease Expense	-0.76	700.00	-700.76	-0.11 %
Office Lease Interest	3,085.00		3,085.00	
<b>Total Office Lease</b>	<b>32,712.24</b>	<b>34,466.00</b>	<b>-1,753.76</b>	<b>94.91 %</b>
Office Supplies	749.36	1,200.00	-450.64	62.45 %
Payroll Expenses				
Deferred Compensation	14,440.53	14,092.19	348.34	102.47 %
Employer Taxes	12,623.93	10,921.70	1,702.23	115.59 %
Medical Benefit	1,799.98	1,800.00	-0.02	100.00 %
PTO Expense	2,337.39	7,500.00	-5,162.61	31.17 %
Salaries and Wages	148,815.50	142,767.36	6,048.14	104.24 %

# State of Nevada Board of Occupational Therapy

## Budget vs. Actuals FY25

July 2024 - June 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
<b>Total Payroll Expenses</b>	<b>180,017.33</b>	<b>177,081.25</b>	<b>2,936.08</b>	<b>101.66 %</b>
Professional Fees				
Accounting	3,316.58	4,500.00	-1,183.42	73.70 %
Legislative Services	33,000.00	33,000.00	0.00	100.00 %
<b>Total Professional Fees</b>	<b>36,316.58</b>	<b>37,500.00</b>	<b>-1,183.42</b>	<b>96.84 %</b>
Travel				
Travel - in state	4,064.94	2,500.00	1,564.94	162.60 %
<b>Total Travel</b>	<b>4,064.94</b>	<b>2,500.00</b>	<b>1,564.94</b>	<b>162.60 %</b>
<b>Total Expenses</b>	<b>\$301,822.49</b>	<b>\$307,157.25</b>	<b>\$ -5,334.76</b>	<b>98.26 %</b>
NET OPERATING INCOME	<b>\$ -14,726.21</b>	<b>\$ -26,042.15</b>	<b>\$11,315.94</b>	<b>56.55 %</b>
Other Income				
Interest Income	11,180.45	11,000.00	180.45	101.64 %
Investment Gain / (Loss)	2,367.88		2,367.88	
Sublease Income	15,042.16	15,042.16	0.00	100.00 %
<b>Total Other Income</b>	<b>\$28,590.49</b>	<b>\$26,042.16</b>	<b>\$2,548.33</b>	<b>109.79 %</b>
NET OTHER INCOME	<b>\$28,590.49</b>	<b>\$26,042.16</b>	<b>\$2,548.33</b>	<b>109.79 %</b>
NET INCOME	<b>\$13,864.28</b>	<b>\$0.01</b>	<b>\$13,864.27</b>	<b>138,642,800.00 %</b>



STATE OF NEVADA  
**BOARD OF OCCUPATIONAL THERAPY**

**Supervision Guidelines**

NAC 640A.250, 640A.255, 640A.260, and 640A.265

***An occupational therapy assistant or provisional licensee shall not practice occupational therapy without the general supervision of an occupational therapist.***

- Verification of employment and supervision by a primary supervisor must be submitted to the Board within 30 days of change.
- An occupational therapy assistant or provisional licensee must have at least one primary supervisor (and may have one alternate) for each employer of record. A primary supervisor shall review documentation maintained by the treating occupational therapist and the OTA or provisional licensee.
- A treating occupational therapist is responsible for delegated occupational therapy services provided by an occupational therapy assistant or provisional licensee.
- Immediate physical presence or constant presence is not required for the occupational therapist.
- To provide satisfactory general supervision, the treating occupational therapist shall:
  - Provide an initial program of intervention and any changes for patients assigned to the OTA or provisional licensee.
  - Ensure that the OTA or provisional licensee does not function autonomously.
  - Establish the patient workload based on the competency of the OTA or provisional licensee.
  - Review written documentation prepared by the OTA or provisional licensee evidenced by a separate progress note or by the OT signing and dating the document prepared by the OTA or provisional licensee.

- Engage in clinical observation or direct communication with the OTA or provisional licensee not less than 1 hour for each 40 hours of work performed. Direct communication may consist of:
  1. Direct or joint treatment of a patient.
  2. Personal supervision while providing services.
  3. Conversation, in person or by telephone.
  4. Exchange of written comments.
  5. Review of patient records.
  6. Conferences, or face-to-face meetings.
  7. Communication using audio-video technology.
- The treating occupational therapist and OTA or provisional licensee shall jointly:
  1. Document the supervision (other than the signing of service records) through:
    - a. Daily or weekly treatment or intervention schedules.
    - b. Logs of supervision.
    - c. Patient records.
  2. Ensure that the record is signed, dated, and reviewed at least monthly by the occupational therapy assistant or provisional licensee and the occupational therapist.
- An OTA or provisional licensee may assist an occupational therapist in:
  1. Preparing and disseminating written or oral reports, including the final evaluation and discharge summary of a patient.
  2. Determine when to terminate treatment unless terminated by the patient or provider of health care.
  3. Delegate duties to an occupational therapy aide or technician.
- An OTA or provisional licensee shall document all treatment provided to a patient and may respond to acute changes in a patient's condition that warrant immediate assistance or treatment.
- An occupational therapy assistant **shall not**:
  1. Write formal evaluations of the progress of a patient to another health care professional. (Daily chart notes in patient records do not constitute a formal evaluation.)
  2. Participate in any meeting with a patient or health care professional, including an educational setting in which the OTA is the sole licensee and the program of intervention may be modified.
  3. Make clinical decisions regarding the provision of services to a patient that conflicts with or overrule the occupational therapist.

**State of Nevada**  
**Board of Occupational Therapy**

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<b>AGENDA ITEM 10: Report from Legal Counsel</b>
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Henna Rasul, Sr. Deputy Attorney General will report on legal matters.

<b>AGENDA ITEM 11: Board Activities &amp; Reports from Members</b>
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**Meeting and Activities Schedule**

Activity	Calendar Year 25/26	Topics/Comments
Board Meeting	July 19	FY 26 Budget Approval Legislative Review
Board Meeting	September 13	FY 25 Budget Adjustment/ Review
Board Meeting	November	NAC Regulations Review
Board Meeting	February	Appointment of Chair and Board Officers

**Future Agenda Items**

**Reports and Comments from Board Members**