



Occupational Therapy Compact Rules Committee Meeting Minutes

March 28, 2023

Committee Members Present:

Michael Sobowale, Chair
Teri Black
Nate Brown
Ann Cosby
Claire Covert-ByBee
Adrienne Price

Committee Members Absent:

Vanessa Beauchamp

Executive Committee Members Present:

N/A

Legal Counsel Present:

Nahale Kalfas, Council of State Governments (CSG)

CSG Staff Present:

Carl Sims
Daniel Clothier

Members of the Public Present:

Judith Joseph
Greg Searls
Caitlin Cornish

Welcome/Call to Order

- M. Sobowale called the meeting to order at 3:31 p.m. ET.

Roll Call

- C. Sims called the roll. V. Beauchamp was absent.

Review and Adoption of the Agenda

- M. Sobowale called for a motion to adopt the agenda.

- **Motion:** C. Covert-ByBee moved that the committee adopt the agenda. N. Brown seconded the motion. All present voted in favor and the motion carried.

Review and Adoption of the Minutes

- M. Sobowale reviewed the minutes and called for a motion to adopt the minutes from the previous meeting.
- **Motion:** T. Black moved that the committee adopt the minutes. A. Cosby seconded the motion. C. Covert-ByBee and N. Brown abstained due to absence at the previous meeting, all others present voted in favor, and the motion carried.

Discussion of Data System Requirements

- The committee reviewed the data system requirements which had been sent out and posted online.
- T. Black raised a concern on the wording on the second page that states individuals will provide Social Security Number and wanted to clarify whether there is another pathway that does not require a SSN.
- Vanessa's written question asked if a state offers NPI and another does not, how the state would be able to match records.
- M. Sobowale suggest striking national provider rule to remedy issue raised by V. Beauchamp.
- M. Sobowale asked CSG If it is possible to provide a unique ID number developed by the compact that can be assigned to each practitioner.
- A. Price asked whether NBCOT already possessed a unique ID for people who have taken the exam and whether that can be used in the compact.
- N. Kalfas states that it may be feasible to assign a number to follow individuals through the system. NPI or social are written in compact and are required and additional requirements can't be made.
- C. Covert-ByBee stated that she believed the language allowed for a third unique identifying number.
- Group discussed states that don't permit the sharing of social security numbers and how to navigate that within the rules and identifying numbers.
- N. Kalfas suggested committee passes rule as-is, while the data set requirements are needed, and then pass an amendment later in time to address concerns as they come up.
- T. Black suggested that additional pathways could be created by allowing NBCOT ID number to be used.
- C. Covert-ByBee clarified that rules committee can define that individuals need to have passed NBCOT.
- M. Sobowale believed that the authority granted in the language allowed the committee to require the SSN to be the unique identification number while allowing other alternative numbers to be used if needed to comply with certain state laws.
- N. Kalfas suggested a rule edit to state "NBCOT certification number or other ID number as approved by the Commission."
- N. Brown asked whether the NBCOT number would be an additional optional number or a required number and states that current language implies that NBCOT is required.

- N. Kalfas suggested language should be a string of “ORs” so to be clear that they are different pathways.
- C. Covert-ByBee asked if NPI was added because of previous difficulties with Medicaid billing for providers with just a compact privilege. Nahale says she does not believe that is the case.
- M. Sobowale suggested deleting “national provider number” because the language in the compact allows for committee to write rules and believes asking for other supplementary numbers satisfies the goals.
- A. Price stated that systems will have to be built to accept various data points and shift them into the correct fields.
- V. Beauchamp’s written question asked what constituted “significant” investigative information and Carl mentioned that that was a defined term.
- V. Beauchamp’s written question asked what was meant by “current” and if past investigations were not available. N. Kalfas clarified the language was intentional and past investigations were addressed elsewhere in language.
- Group agreed to strike NPI option from wording.
- M. Sobowale addressed that a time frame is not provided when member states must submit initial data to system.
- The group agreed to table the issue for subsequent rule changes considering data system is not yet set up.
- **Motion:** N. Brown made a motion to table the remainder of the agenda for next meeting. A. Price seconded motion. All present voted in favor and the motion carried.

Questions and Comments

- M. Sobowale asked for additional questions and comments from the delegates.

Meeting Closure

- Hearing no further comments, M. Sobowale called for a motion to adjourn.
- **Motion:** A. Cosby motioned to adjourn. N. Brown seconded the motion. The meeting adjourned at 5:03 p.m. ET.