



2025 NCOTA Fall Conference Schedule Detailed Educational Courses

Friday, OCTOBER 24, 2025

7:00 - 8:00 Registration

8:00 - 11:00 Workshop Session 1

1A. The WoMB Clinic: Occupational Therapy's Distinct Role in Providing Comprehensive Maternal Health Care

Reeti Douglas, OTD, OTR/L, CLC; Patee Tomsic, OTD, OTR/L, CLC; Stacey Caplan, OTD, OTR/L; Wynnet Sinclair, OTD, OTR/L

Children and Youth, Education and Research | **Intermediate**

The WoMB (Women-Mother-Baby) Clinic, established through the Wingate University Doctor of Occupational Therapy program, is a free clinic dedicated to serving women and mothers in southeastern North Carolina. The clinic offers specialized services including lactation counseling, pelvic floor therapy, infant development evaluation, and mental health support. This presentation will provide an overview of steps taken to launch the clinic, from securing funding and building community partnerships to service implementation and student involvement. It will highlight occupational therapy's distinct role in addressing maternal health needs before, during, and after pregnancy. Attendees will gain insights into effective strategies for marketing free maternal health occupational therapy services to underserved populations, as well as the benefits of integrating occupational therapy students into early experiences within this emerging practice area. Through the WoMB Clinic's journey, participants will discover practical, replicable approaches to developing impactful, community-driven maternal health programs. Our first interactive component will guide participants through basic breath work and pelvic floor exercises designed to support and protect the pelvic floor during heavy lifts and transfers. While these strategies are commonly introduced in perinatal and postpartum pelvic floor therapy, the principles apply universally to women engaging in physically demanding tasks across all practice settings. In our next component, learners will be guided in ergonomic analysis of breastfeeding positions to support engagement in mother and infant co-occupations. These interactive activities will provide hands-on learning for immediate application and practice

1B. Upper Quarter Screen

Marc Bartholdi, OTD, OTR/L, CHT; Li'Anna Drossos, DC; Samantha DeMaria Feltes, OTR/L, COMT-UE, CHT
Physical Disabilities | **Novice**

Direct access clients and unclear upper extremity diagnoses can be challenging for any practitioner. In this course, we will review a systematic screening approach to help focus your evaluation and assessment skills on these unclear cases. This upper-quarter screening tool uses inspection, cervical spine screen, joint scan, reflex assessment, myotome and dermatome scan, neural tension testing, and palpation to determine the source of your client's condition. In this hands-on course, we will discuss the purpose of the upper-quarter screen, explain when it would be appropriate to use this tool, and systematically practice each part of the upper- quarter screen. Participants are encouraged to wear clothing that allows access to the shoulder and cervical spine.

1C. Primitive Reflex Retention: A Hidden Factor in Oral Motor Challenges

Megan Buckland, MOT, OTR/L; Hannah Youker, COTA/L

Children & Youth | **Intermediate**

This topic will be an overview for occupational therapy practitioners to understand and have a deeper knowledge of the direct link between primitive reflexes and the impact they can have on oral motor patterns when retained. Secondly, to postural control, sensory processing, fine motor coordination required for mature oral motor patterns, as well as a decrease for self feeding independence.

11:00 – 12:30 Lunch & Learn SIS Breakout Sessions

Children & Youth SIS - Round Table Discussion: Navigating Mental Health and Behavior Changes in today's Youth: The impact on evaluations, interventions, and occupational performance

Participants will review data on increasing behavior and mental health challenges/diagnosis within today's youth. Topics for discussion will include OT's role in navigating the impact on occupational performance in the school and community setting, evaluations used to determine needs, and OT's role in supporting children and families

Mental Health SIS - Every OT Is a Mental Health OT: Tools You Can Use Tomorrow Across Settings

Occupational therapists in every setting encounter mental health needs, whether working in schools, physical rehabilitation, or traditional mental health practice. This engaging panel brings together practitioners from each of these areas to share practical strategies for integrating mental health goals into daily OT practice. Panelists will highlight evidence-based tools, real-world examples, and actionable interventions that support emotional regulation, resilience, and participation. Attendees will leave with concrete skills and resources they can apply immediately in their own settings.

Gerontology & Physical Disabilities – Standing Strong: Advocacy for OT and Each Other

Gerontology and Physical Disabilities SIS co-chairs will facilitate an interactive conversation inviting occupational therapy practitioners to come together in a safe and supportive space to talk about the real challenges we face in practice today. Through open discussion and shared experiences, participants will identify common concerns and explore how advocacy can strengthen both individual practitioners and the profession as a whole. Together, we will brainstorm practical solutions and produce concrete strategies to support ourselves, each other, and the future of occupational therapy.

12:30 - 3:30 Workshop Session 2

2A. Beyond the Ramp and Reacher: Preparing Clients for Wheelchair Life

Kathryn Sorensen, OTD, OTR/L

Physical Disabilities, Home & Community Health | **Novice**

This course, taught by an occupational therapist who uses a wheelchair, goes beyond the basics to uncover the real-world complexities of navigating home and community life in a wheelchair. Through an in-depth look at wheelchair mobility, environmental modifications, and practical problem-solving, participants will gain the knowledge to support clients in achieving safety, independence, and meaningful participation. From home adaptations and federal regulations to travel tips and community access strategies, therapists will leave with actionable tools to help clients of all ages confidently navigate their environments.

2B. Sharpening the Edge: Clinical Reasoning & Communication for Confident OT Practice

Maryann B. Brennan, OTD, MA, OTR/L, Alyssa Pittman, MS OTR/L, CLT

Physical Disabilities | **Novice**

This session will address two of the most essential yet commonly underdeveloped skills in early occupational therapy practice: clinical reasoning and professional communication. Through evidence-based discussion, interactive case activities, and practical tools like SBAR, participants will explore how to navigate complex decision-making and advocate effectively within interprofessional teams. Designed for both new and early-career occupational therapy practitioners, this workshop provides strategies that can be immediately applied across settings such as acute care, pediatrics, schools, and long-term care. By strengthening these core skills, participants will enhance their confidence, effectiveness, and contribution to quality client outcomes. This presentation supports the continued professional development of occupational therapy practitioners and encourages reflection on how foundational competencies evolve throughout the career span.

2C. F. Occupational Therapy practitioners role in managed care while transitioning people from homelessness to Independent Living in the community

Tracee Okoduwa, OTR/L

Home & Community Health | **Novice**

Occupational Therapy's role in managed care with the severe persistent mentally ill and dually diagnosed population. After this course you will understand how the mentally ill population can now get medically stable enough to live in independent housing while simultaneously working on sobriety and recovery. Attendees will learn how managed care organizations are offering Medicaid to the dual diagnosed population, and your taxpayer dollars are working to decrease homelessness and divert people from adult care homes. See how North Carolina is now similar to other states like California with a revolutionary housing homelessness program. The Transitions to Community living (housing) program is through the Department of Health and Human Services and it is ensuring the mentally ill population has the right to live, work, and play in independent housing instead of group homes and institutionalization.

3:30 - 4:30 Ethics

SATURDAY, OCTOBER 25, 2024

8-8:15 Welcome & Introductions

8:15- 9:15 Organizational Updates

NCBOT Updates
AOTA Board Updates
AOTPAC Updates
AOTF Updates

9:30-10:30 Keynote Address

10:30-12:00 Exhibitor Hall | AT Competition 10:30-11:15 | Poster Session 11:15-12:00

The winner of the AT Competition will be announced at 12:10!

1:00 – 2:30 Short Course Session 1

1A. Driving Risk: Current Tools for Occupational Therapy Practitioners

Anne Dickerson, PhD, OTR/L, SCDCM, FAOTA, FGSA
Home & Community Health | **Intermediate**

Driving and community mobility is a highly valued IADL and essential for maintaining independence, health and quality of life. Thus, occupational therapy practitioners (OTP) should be considering driving risk for individuals with medical conditions that may impact driving. It is important for OTPs to understand that considering driving risk does not mean “taking someone’s license away,” but identifying risk in order to address the possibility of injury or fatalities as well as strategies to improve or maintain driving with adaptations or accommodations. Just as an OTP identifies client risk in the bathroom or living alone, it is even more critical for practitioners to identify driving risk due to driving being an IADL done in the public domain. That is, if the person is unfit, they put themselves and other individuals at risk. This presentation will: 1) illustrate the use of a driving risk screening tool to be used as a generalist to identify risk and/or making a referral; 2) offer two products developed by the Governor’s Highway Safety Program for use with providers of older adult care and/or older adults themselves to understand driving risk and driving evaluation; and 3) participate in a group discussion about strategies that OTPs can use in their individual practice to address driving.

1B. Shared Skills, Shared Goals: OT-PE Collaboration to Foster Play and Growth

Sherry Stancliff, OTD, OTR/L, SCSS and Taylor Welch, BS, COTA/L, Jamie Goubeaux, M.S.Ed.
Children & Youth, Physical Disabilities | **Novice**

According to AOTA (February 2025), one-third of occupational therapy practitioners (OTPs) work in public schools or early intervention programs as related services personnel under IDEA or Specialized Instructional Support Personnel (SISP) under ESSA. OTPs support children across environments alongside various educators. An overlooked partner is the physical education (PE) teacher, who fosters skills such as teamwork, goal setting, time management, emotional regulation, communication, social skills, leadership, and problem-solving—through play, the primary occupation of children. Research shows PE instructors seek collaboration to adapt and modify activities for students. This course invites OTPs to explore strategies for partnering with PE instructors to enrich social, developmental, and play-based outcomes. Learn how interdisciplinary teamwork can expand your impact, strengthen student engagement, and create inclusive opportunities for every child.

1C. Clinical Insights from the Power Over Parkinson’s Program

Lauren Turbeville, OTD, OTR/L, Kelsey Arnold, OTS, Courtney Frycz, OTS, Anna Horne, OTS
Physical Disabilities, Gerontology | **Novice**

This presentation highlights the integration of the Performance Assessment of Self-Care Skills (PASS) in the “Power Over Parkinson’s” program, which uses PWR!Moves® and targeted interventions to enhance functional performance in adults with Parkinson’s disease. It outlines Parkinson’s symptoms, introduces the PASS tool for assessing ADLs/IADLs, and explains how assessment outcomes guided individualized, occupation-based

group interventions. Five case studies illustrate participants' unique presentations and functional progress. Intervention examples include activities like the "Toothpaste Relay" and a home safety "Escape Room," tailored to improve real-world skills. The presentation emphasizes interdisciplinary care, the utility of standardized assessment for tracking progress, and the importance of adaptive, engaging, and cognitively stimulating interventions in supporting occupational participation for individuals living with Parkinson's.

1D. NBCOT® National Certification Exam: Information You Need to Know

Taz (Tae-sun) Kang, MSOT, OTR/L, NBCOT Ambassador for North Carolina
Student | **Novice**

During this session, an NBCOT Ambassador will share valuable information about preparing and applying for the national OTR and COTA certification exams. Specific topics include exclusive details about the exams, study tool resources, test day information, data regarding exam questions, and advice from other students and recent certificants. This presentation will allow you to be better informed about the various aspects of the national certification exam experience.

1E. Blueprints for Practice: Unlocking the Power of AOTA Documents

Susan Blair, OTD, OTR, BCPR, BCG
Student | **Novice**

The AOTA Commission on Practice (COP) supports and advances occupational therapy by developing and revising over 30 official documents that guide evidence-based, client-centered practice. These include key resources such as The Occupational Therapy Practice Framework: Fourth Edition (AOTA, 2020b), Guidelines for Documentation in Occupational Therapy (AOTA, 2018), and Guidelines for Supervision, Roles, and Responsibilities During the Delivery of Occupational Therapy Services (AOTA, 2020a). Grounded in current evidence and systems awareness, these documents align with Vision 2030 and help practitioners articulate the distinct value of the profession. This short course, led by a COP member, will provide an overview of the commission's role, highlight key documents, and outline the revision process for the Framework. Participants will explore case examples and complete a reflective activity to apply AOTA documents to strengthen and expand their practice.

1F. Stitching Meaning into Practice: Honoring Dr. William Rush Dunton's Legacy to Empower Future OT Advocacy

Cathy Zanowski, OT/L
Education Research | **Novice**

Dr. William Rush Dunton, the "Father of Occupational Therapy," championed the concept that engagement in meaningful activities is central to healing and well-being. Beyond his medical background, Dr. Dunton was also passionate about quilts, and believed in the therapeutic power of occupation. This 90-minute session will weave together history, art, advocacy, and education as we explore Dr. Dunton's contributions through a modern lens. Attendees will engage with historical insights, visual storytelling (including images of Dr. Dunton's quilts), and reflective discussions on how his ideals resonate with today's practice. We will discuss how his emphasis on purposeful activity forms the backbone of occupational therapy today—and how we can draw from his vision to advocate for the future of the profession in a changing healthcare landscape. Participants will leave inspired to incorporate historical awareness, creative practice, and meaningful engagement into their roles as educators, clinicians, and advocates, reinforcing the theme "Together We Rise."

1G. Camp Connections: Occupation-Centered Teaching and Learning in Two Naturalistic Fieldwork Settings

Heather McKay, PhD, OTR/L, BCG, FAOTA (Primary Speaker); Avery Rabon, OTS; Brandy Hayes, OTS
Children & Youth, Physical Disabilities, Student | **Novice**

Inspired by a presentation at NCOTA's 2024 Fall Conference, our MSOT program expanded the use of camp-based Level I fieldwork across multiple courses through integrative assignments—continuing the conversation sparked last year (Gallagher et al., 2024). In this session, student and faculty presenters will share lessons learned from two unique camp settings: one for adults with developmental disabilities (Camp Blue Skies) and one for children and families with diverse medical needs (Victory Junction). Stories and reflections will

illustrate how immersive, naturalistic environments foster OT skill development, interprofessional collaboration, occupation-based program development, and a deeper understanding of occupation-centered practice. We will compare opportunities, roles, and challenges in each setting, and invite attendees to consider camp environments as rich, engaging fieldwork sites—and potential employment sites—that advance participation, inclusion, and professional growth.

1H. Developing Professional Reasoning Using Simulation Experiences Throughout an OTA Curriculum

*Kathy Subasic PhD, OTR/L, CAPS, ECHM; Anna DeDiemar MS, OTR/L
Education & Research | Intermediate*

This course examines how an OTA program uses simulation-based learning to build students' professional reasoning, covering theory, key concepts, curriculum integration, and hands-on strategies for implementation.

2:45 – 4:15 Short Course Session 2

2A. Addressing Sexual Expression in a Skilled Nursing Facility

*Hannah Brock, OTD, OTR/L, CNS
Gerontology | Intermediate*

Sex is an ADL that can feel taboo to address, especially in a long-term care setting. Additionally, there is little guidance available for how to navigate a resident-resident sexual relationship in a safe way for all parties. Occupational therapy practitioners (OTPs) are uniquely qualified to support this critical aspect of wellbeing by addressing health, safety, cognition, harm reduction and caregiver education as it relates to sexual relationships. Using a real-world example and a case study format, this short course discusses the role of OTPs in advocating for sexual expression and facilitating sexual health and wellness in a skilled nursing facility while adhering to CMS and NCDHHS regulations, navigating staff attitudes and personal biases, consulting on facility policy/protocol development and engaging in interdisciplinary collaboration.

2B. The Impact of Antipsychotic Use in Childhood on Engagement in Meaningful Occupations for Historically Marginalized Youth

*Carli DiMeo, OTD, OTR/L
Children & Youth, Mental Health | Intermediate*

Antipsychotic use, prevalent among 1.7% of youth, can impede play, sleep, feeding, and school participation. OT can help address side effects that impact daily life, using sensorimotor, routine, and compensatory strategies to support participation.

2C. Every Moment Matters: Infant/ Toddler Feeding and Mealtime Intervention Strategies

*Kimberly Holt, OTD, MS OTR/L; Diane Fleetwood, OTR/L SCFES
Children & Youth, Student | Novice*

This course will provide OT practitioners with general and basic feeding strategies in the early intervention practice area to identify delays early and promote improved intervention outcomes. The OT practice framework identifies feeding and eating as an ADL that occurs across the lifespan. Many therapists feel that feeding and eating require specialty training, but that is not the case. Assessment and intervention methods will be discussed to help identify the child's skills and involve parents to determine intervention focus. The use of a responsive, coaching interaction style within early intervention practice will be reviewed to support therapists in providing

performance components according to the practice framework while ensuring family and child participation. The course will also offer recommendations for ongoing growth and training in infant and toddler feeding and emphasize the importance of OT within community health and feeding intervention teams.

2D. The MARS-Project, Mentorship, Advocacy, Research, and Service: Proposed Guidelines for Professional Development

Jose R. Rafols, EdD, OTD, MHSA, OTR/L

Education & Research, Student | **Intermediate**

The MARS project is a multi-dimensional concept that allows for exploration of mentorship, advocacy, research and service among junior practitioners, academicians and rising scholars. Use of exploratory and contextual examples, as well as the commingling of these examples with intentional mentorship fosters self-advocacy and enhances awareness for community-based service provision. The MARS project serves an expansive occupation-based landscape promoting professional development among students involved in capstone experiences, master, bachelor, as well as associate level OT students. The MARS project may be leveraged to accelerate and energize one's budding career. Each component of professional and personal development can individually add distinction to one's practice career; however, collectively the amalgamation of all the MARS components can add greater distinction and satisfaction to said career.

2E. Cultural Considerations for the Occupational Therapist/Occupational Therapy Assistant

Wendy Beglin MSOT, OTR/L

General | **Novice**

This presentation explores the intersection of culture and health disparities, emphasizing the importance of health equity in occupational therapy. It defines key concepts such as health, equity, and health disparities, and examines how social, economic, and cultural factors influence healthcare outcomes. Through interactive activities and real-world case studies, students learn to recognize and respect cultural differences in therapeutic settings. The presentation highlights cultural intelligence as a vital skill, showcasing diverse traditions, greetings, and beliefs across global communities. By fostering cultural awareness, the content prepares students to deliver inclusive, patient-centered care that addresses systemic inequities and improves health outcomes for diverse populations.

2F. Addressing sex and intimacy: A conversation for students and new grads

Daniella Hauser, OTD, OTR/L, CSOT

Physical Disabilities, Student | **Novice**

Sex and intimacy are an under addressed area in OT practice. It is growing, but the next generation of practitioners need to learn to grow more comfortable with the topic. This course will target OT and OTA students to help learn how to address the topic for future practice. The course will cover ways to have a conversation, handouts and client education, and basic equipment and interventions.

2G. Current state of gender-affirming healthcare and occupational therapy's role

Christine McConnell, DC, OTR/L; Grace Mercer, OTDS

General | **Intermediate**

Gender-affirming healthcare establishes a standard of care that promotes inclusion, acceptance, and equity amongst clients and therefore inherently aligns with occupational therapy. Each state is able to determine the extent of allowed gender-affirming services, limiting some of the key features of gender-affirming care. Further education on what gender-affirming healthcare looks like for the transgender and gender-diverse client population is necessary to understand how to maintain OT's client centered focus. Common barriers faced by those who are entitled to gender-affirming care prohibit participation in daily occupations and can harm the overall well-being of transgender and gender-diverse clients. Occupational therapy practitioners' role in gender-affirming healthcare in practice, education, and advocacy is explored.

4:30 – 6:00 Short Course Session 3

3A. Application of Therapist Readiness Flowchart as a Tool to Decrease Practitioner Injury

Hilary Till OTR/L, Sarah Wright OTD OTR/L

Physical Disabilities, Student | **Novice**

Musculoskeletal injuries from patient handling remain a leading cause of lost work time among occupational therapy practitioners. This session introduces an evidence-informed Therapist Readiness Flowchart—a rapid, pre-transfer self-check tool designed to help practitioners assess their own physical and cognitive readiness before engaging in high-risk mobility tasks. Drawing on national Safe Patient Handling and Mobility (SPHM) standards, occupational health research, and validated pain measurement, the tool provides a structured decision-making pathway to enhance safety, reduce injury risk, and support sustainable practice. Participants will learn how to apply the flowchart, integrate it into daily routines, and adapt it for various settings. By embedding therapist self-readiness checks into practice, occupational therapy practitioners can better protect their own health while delivering safe, effective client care.

3B. From Passion to Practice: OT's Role in Community-Based Home Modifications

Keisha Lewis OTR/L, MS, CAPS, CDCES

Home & Community Health, Gerontology | **Intermediate**

In alignment with the 2025 Fall Conference theme "Together We Rise: Growing OT Through Engagement & Advocacy," this session explores how occupational therapy practitioners can expand their impact beyond traditional medical models by partnering with community-based organizations. Learn how innovative collaborations—like the Elder Response Initiative and the HUD Older Adults Home Modification Program led by For The Struggle, Inc.—are creating safe, accessible home environments for older adults. Participants will gain insights into effective strategies for engaging in community-based advocacy, leveraging your skills as an OT to partner with community-based non-profits, and driving systems-level change to support aging in place.

3C. Advocacy and Community Engagement: Expanding the Impact of Occupational Therapy

Tina Webb, PP-OTD, MS, OTR/L, CSRS, CGCP; Megan Edwards Collins, Ph.D., OTR/L, FAOTA, CAPS, CFPS; Jeffery T. Lucas, Ph.D., OTR/L, CDP, CKTP, CAPS; Sanchala K. Sen, OTD, MS, OTR/L, BCPR, FAOTA; Rebecca Thompson, OTD, OTR/L; Chinno Ingram, DrOT, OTR/L, PTA, CEAS; Allison D. Calhoun, MS, OTR/L
Education & Research, Home & Community Health | **Novice**

Occupational therapy practitioners play a critical role in advancing health, well-being, and participation across diverse populations. This session will explore practical strategies for advocacy and community engagement to strengthen the voice and visibility of the profession implemented by several educators from an MSOT program. Participants will learn to identify community opportunities, build collaborative partnerships, and influence policy to address occupational injustices. Real-world examples will illustrate how targeted advocacy and intentional engagement can improve access to services, increase community awareness, and create sustainable change. Attendees will leave with actionable tools to promote occupational therapy's distinct value.

3D. The Mauna Model: A Trial Guide for Developing Competencies in Occupational Therapy Professionals

Dr. Kelly McGlooin, PhD, OTR/L

General | **Novice**

This session will explore the development of the Mauna Model, a conceptual model focused on guiding the individual, holistic development of occupational therapy students and professionals. By helping individuals identify and reflect on core competencies of our profession, the Mauna Model aims to develop more confident and resilient occupational therapy professionals.

3E. Leadership as a Meaningful Role: Navigating Purpose, Power, and Professional Identity

Amy Mahle EdD, COTA/L, ROH & Amber Ward, MS, OTR/L, BCPR, ATP/SMS, FAOTA

General | **Intermediate**

Leadership in occupational therapy is more than a title, it is a dynamic, values-driven role expressed through service, collaboration, and shared purpose. This session explores leadership and followership through the Model of Human Occupation (MOHO), OTPF-4, and frameworks like Ikigai and emotional intelligence. Presenters will examine how volition, communication, and ethical tensions shape leadership roles, including the risk of burnout. Participants will engage in guided self-reflection using curated assessments to explore personal values, leadership habits, and professional identity. With a focus on sustainability, mentorship, and advocacy, attendees will identify ways to align leadership with their life roles and career paths. This interactive session blends research, theory, and lived experience to inspire authentic, purposeful leadership grounded in occupational therapy's core values.

3F. Expanding Diabetes Education Access Through Occupational Therapy

*Susan Misciagno, OTD, OTR/L, BCG; Jaden Zaneck; Michael R. Jiroutek, DrPH, MS
Home & Community Health, Gerontology | **Intermediate***

This session presents updated findings on disparities in the delivery of diabetes education, based on national outpatient care data and current clinical guidelines. Participants will examine how underserved groups—especially rural residents, individuals with obesity, and tobacco users—are less likely to receive guidance on diet, exercise, weight management, and diabetes care. Through the lens of occupational therapy, the workshop highlights strategies such as health literacy support, lifestyle redesign, and behavior change techniques to address gaps in education and promote self-management. Attendees will analyze national trends, discuss the impact of limited access on high-risk populations, and design collaborative, practical models to expand education delivery and improve outcomes in underserved communities.

3G. Empowering Abilities: Exploring Assistive Technologies for Workplace Inclusion

*Christey Kirk, COTA/L, ATP Julie Dutchess, ATP
Technology, Physical Disabilities | **Novice***

We will explore the transformative impact of assistive technology in creating inclusive workplaces where individuals with disabilities can thrive. Participants will learn about a variety of assistive technologies to support obtaining and maintaining employment across various industries. We will demonstrate how these technologies break down barriers, foster independence, and enhance career opportunities. This presentation will cover practical strategies for implementing AT solutions, including task analysis, customization and simple modifications that can be made to everyday items to better meet individual needs. Join us to discover actionable strategies for implementing AT, championing inclusivity, and creating a truly supportive and diverse workplace.