# OCCUPATIONAL THERAPY LICENSING BOARD

## Annual Performance Progress Report (APPR) for Fiscal Year (2013-2014)

Original Submission Date: 2014

Finalize Date: 7/8/2014

| 2013-2014 KPM # | 2013-2014 Approved Key Performance Measures (KPMs) |
|---|---|
| 3 | CUSTOMER SATISFACTION: Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information |
| 4 | BEST PRACTICES: Percent of total best practices met by the Board. |
| 5 | TIMELY LICENSING – Percent of licensing applications processed within target. |
| 6 | TIMELY RESOLUTION OF COMPLAINTS - Percent of cases investigated and referred to Board within 120 days of receipt of complaint. |

| New Delete | Proposed Key Performance Measures (KPM's) for Biennium 2015-2017 |
| --- | --- |
| | **Title:**<br><br>**Rationale:** |

| OCCUPATIONAL THERAPY LICENSING BOARD | I. EXECUTIVE SUMMARY |
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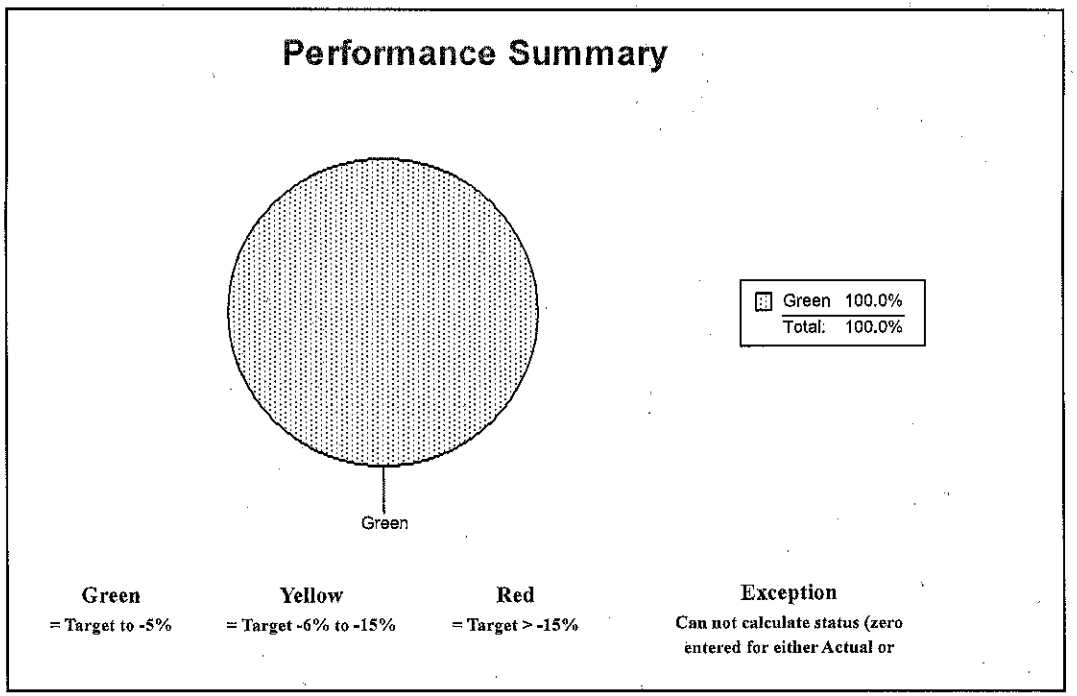
**Agency Mission:** The mission of the Occupational Therapy Licensing Board is to protect the public by supervising occupational therapy practice to assure the safe and ethical delivery of services in Oregon.

| **Contact:** Felicia Holgate, Director | **Contact Phone:** 971-673-0198 |
|---|---|
| **Alternate:** | **Alternate Phone:** |




## 1. SCOPE OF REPORT

The Oregon Occupational Therapy Licensing Board's primary functions are to investigate complaints and take appropriate action, to issue licenses to qualified applicants, to enforce and make rules including for continuing education, and enforce and generally supervise occupational therapy practice. The key performance measures focus on: Discipline, Issuing licenses in a timely manner, Customer Satisfaction, and Board's Best Practices. All the Board's programs and services are addressed by these performance measures.

## 2. THE OREGON CONTEXT

Occupational Therapists must be licensed in order to work in Oregon. Applications are closely scrutinized and issued quickly, continuing education is checked and all complaints are investigated. The Board expects a high level of excellent customer satisfaction.

## 3. PERFORMANCE SUMMARY

The Boards meets the goals and works hard to be efficient and effective.

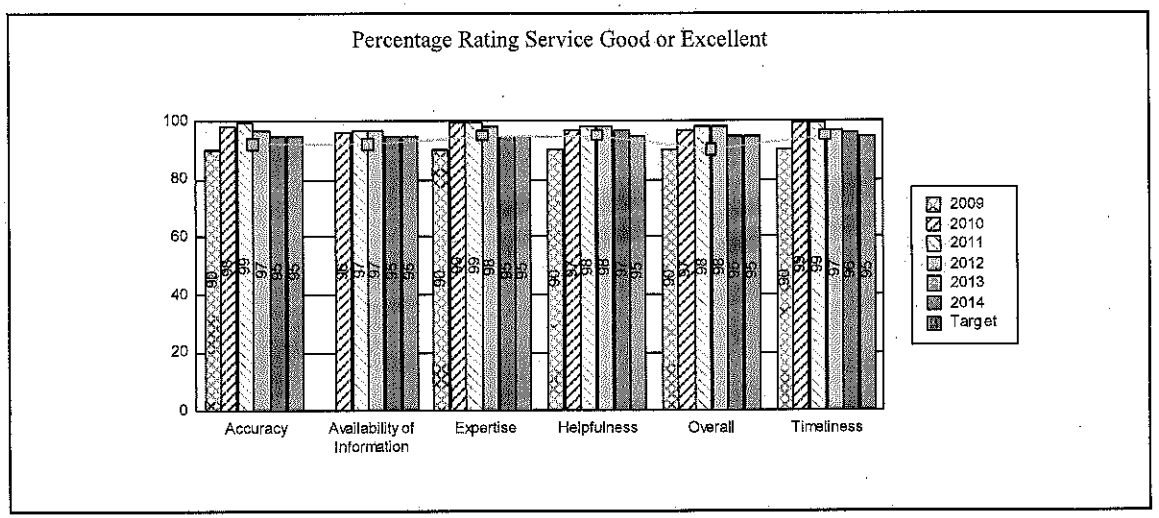
## 4. CHALLENGES

The Oregon Occupational Therapy Licensing Board customer satisfaction survey shows a high level of satisfaction. Being a very small board during renewals every two years it is very busy and priority is given to the most essential services. With a large increase in license numbers and increase in complaints, the Board will need to additional staff.

## 5. RESOURCES AND EFFICIENCY

The Agency's budget for fiscal year 2013-2015 is $368,816. The Board has been able to keeps it 2 year renewal fees at the reduced rate. Revenues come from Occupational Therapy license fees and are all **other funds.**

| KPM #3 | CUSTOMER SATISFACTION: Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information | 2004 |
|---|---|---|
| **Goal** | CUTOMER SERVICE: In order to better serve the public and licensees, the Occupational Therapy Licensing Board attempts to work efficiently and provide a high level of customer service. | |
| **Oregon Context** | High level of customer service satisfaction. | |
| **Data Source** | The Board uses a customer satisfaction survey that automatically collates all responses made. The survey is anonymous and the Board and Director have no access to the survey except to see the survey results. Survey results can be reviewed by month or the total of all responses in individual years. Graphs are automatically generated. All comments are recorded. Each e-mail that goes out has a request to fill out a survey. Each licensee that obtains a license and all interested parties are asked to fill out a survey on an annual basis. | |
| **Owner** | OTLB Director, Felicia Holgate 971-673-0198 | |




## 1. OUR STRATEGY

The Board sends an e-mail request for licensees, Interested parties and anyone else contacting the Board or visiting the web site, to fill out a short, anonimous customer satisfaction survey. Results are collated automatically. The Board reviews all comments to help improve services.

## 2. ABOUT THE TARGETS

The Board expects a high level of customer satisfaction.

## 3. HOW WE ARE DOING

The Board continues to provide efficient and effective services and evaluates survey answers to continue improving services. The goal is to license within 3 days of receipt of all documentation, and respond to all requests within a few days. The Customer survey results reflect the high level of satisfaction by those contacting the Board.

## 4. HOW WE COMPARE

The Occupational Therapy Licensing Board continues to provide great services and those contacting the Board respond with a high level of satisfaction.

## 5. FACTORS AFFECTING RESULTS

The Board continues to expect and provide a high level of service and expects high satisfaction of its services in all areas.

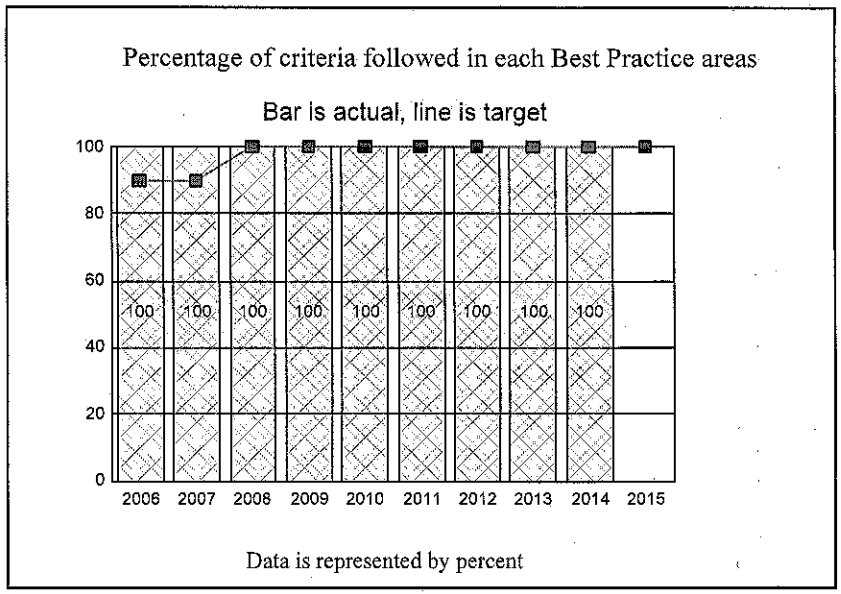
## 6. WHAT NEEDS TO BE DONE

The online survey responses are automatically collated. The Board continues to review all comments and uses them to help improve its services.

## 7. ABOUT THE DATA

Data for all survey results and comments can be viewed at the Board office.

| KPM #4 | BEST PRACTICES: Percent of total best practices met by the Board. | 2007 |
|---|---|---|
| Goal | The goal is to have high level of success in following Board best practice | |
| Oregon Context | The measue is on what percentage of the criteria for board best practices is followed by the Board. | |
| Data Source | Completion of Best Practices survey is completed annually by the Board. In 2008 criteria for each Best Practice were adopted by the Board. These criteria are used for the completion of the survey each year. | |
| Owner | Director, Felicia Holgate 971-673-0198 | |




## 1. OUR STRATEGY

The Board members attended the previously available Governor's training, and discuss the criteria for each best practice area. Currently a documents for Board members training was developed and reviewed by the newest Board member.

**2. ABOUT THE TARGETS**

The Board intends to comply with all Board Best Practices.

**3. HOW WE ARE DOING**

The Board continues to comply with all Best practices.

**4. HOW WE COMPARE**

The Board is doing well.

**5. FACTORS AFFECTING RESULTS**

The Board and the Director work very well together.

**6. WHAT NEEDS TO BE DONE**

The Board will continue reviewing best practice issues.

**7. ABOUT THE DATA**

The Board reviews the Best Practices each year.

| OCCUPATIONAL THERAPY LICENSING BOARD | II. KEY MEASURE ANALYSIS |
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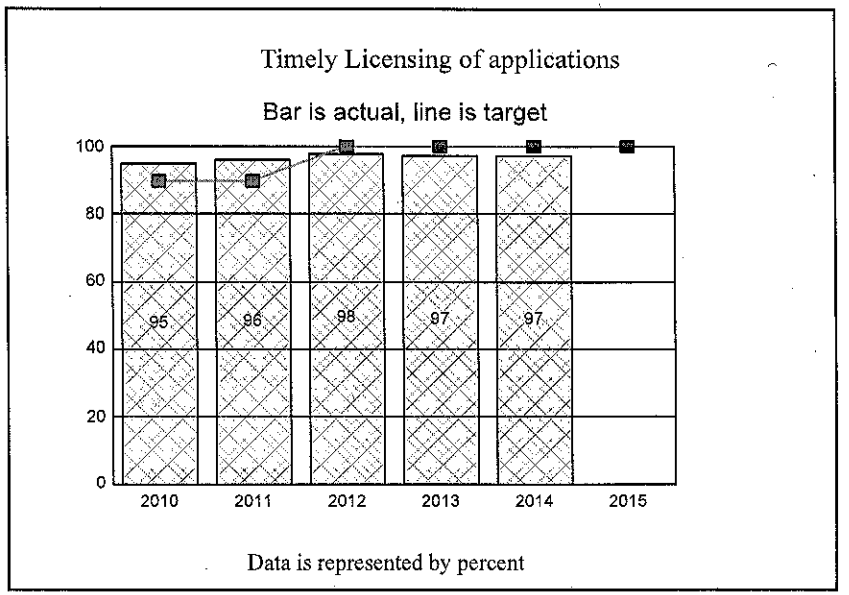
| KPM #5 | TIMELY LICENSING – Percent of licensing applications processed within target. | 2010 |
|---|---|---|
| Goal | The goal is to provide health services needed for the citizens of Oregon by issuing licenses to qualified applicants quickly. | |
| Oregon Context | The Board provides protection of the publice by issuing qualified Occupational Therapy applicants with licenses as quickly as possible. The added benefit is to provide employment for applicants who to fill needed health care positions in Oregon. | |
| Data Source | The applicant files show date of receipt of applications and the data base shows initial dates. All documents are OTLB date stamped upon receipt so files can be check on how quickly the license is issued upon receipt of all required documentation. | |
| Owner | Director, Felicia Holgate 971-673-0198 | |




## 1. OUR STRATEGY

The Board works hard to issue license to all qualified applicants upon receipt of all documents required. All pending files are also periodically reviewed see

what is still missing and often the applicant is contacted.

**2. ABOUT THE TARGETS**

This measure is a new pilot project for several health boards to have similar measures. The target is that 90 % of all applicants will receive their license within 5 days of receipt of all documentation required. The Board's goal is to issue licenses within 3 days.

**3. HOW WE ARE DOING**

Almost all applicants are issued their license within a few days. Delays occur infrequently usually because a document is in another file, sometime because a second file is opened because documents for the same applicant come under different names. This performance measure is part of a Pilot Project to have health boards in Oregon have the same performance measures.

**4. HOW WE COMPARE**

The Occupational Therapy Licensing Board issues licenses within 3 days of receipt of all required documentation. The Board compares well in this perforamnce measure among other health boards.

**5. FACTORS AFFECTING RESULTS**

During renewals of over 1800 renewal licenses it is very busy and with a very small staff the new appolicant files are not always reviewed as often for general status (without a reques from an applicant when the file is always quickly reviedwed within a day or so). There are only a few appliant files are not issued within five days. Delay has occured, though infrequently, when document is misfiled or a document comes in under a different name.

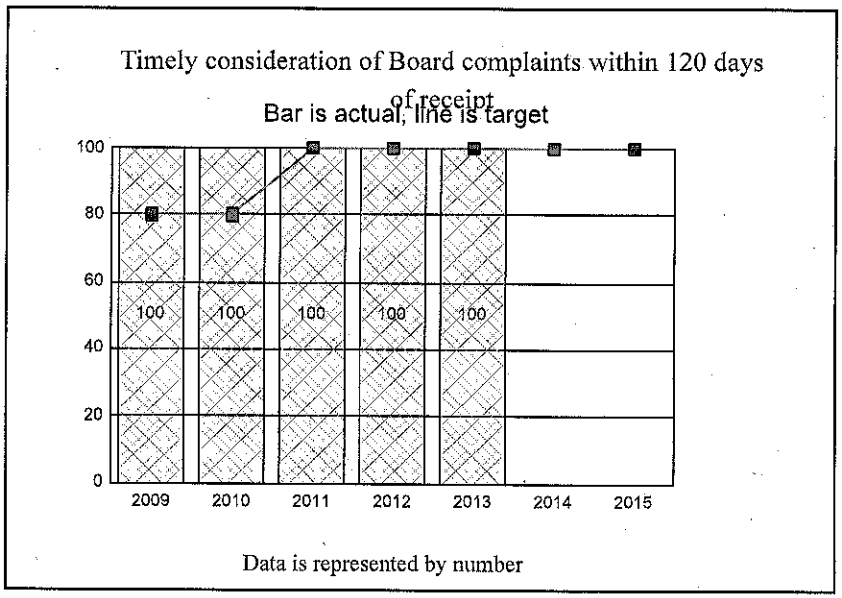
**6. WHAT NEEDS TO BE DONE**

All open files need to be reviewed on a periodic basis to determine what is still missing in order to issue the license. There will be a new data system put into place where we hope to have an automatic way to review what is still required for any applicant.

**7. ABOUT THE DATA**

The reporting is by calendar year. The Director keeps a record of any file application if licenses are not issued within 3 days of receipt of all documents and the date and reason for the delay. With a new data system which will be developed in the next year we hope to have this automated so a report can be prepared each day showing what is still missing for any applicant file.

| KPM #6 | TIMELY RESOLUTION OF COMPLAINTS - Percent of cases investigated and referred to Board within 120 days of receipt of complaint. | 2009 |
|---|---|---|
| Goal | The goal is to investigate and take action quickly on all complaints and to prioritize complaints where patient harm is alleged. | |
| Oregon Context | Timely resolution of complaints will protect the public. | |
| Data Source | Complaint files and Board minutes show the data. | |
| Owner | Director, Felicia Holgate 971-673-0198 | |




## 1. OUR STRATEGY

The Board reviews all pending complaints at each Board meeting and prioritizes any complaints to set special conferences where patient injury is alleged. A special meeting of the board is set if an Occupational Therapists action may be harmful to a patient.

## 2. ABOUT THE TARGETS

The target is high. This measure is new and a part of a Pilot Project to have similar measures by Oregon health boards.

## 3. HOW WE ARE DOING

The Board continues to consider all pending complaints at each Board meeting.

## 4. HOW WE COMPARE

The Occupational Therapy Licensing Board compares well with other health boards.

## 5. FACTORS AFFECTING RESULTS

The Board has a small staff and if complaint numbers increase more staff will be needed to help investigate complaints. The Board has been able to contact with a former Board memberswho knows well the importance of protecting the public and how to investigate complaints.

## 6. WHAT NEEDS TO BE DONE

The Board needs to continue to consider all pending complaints at each Board meeting.

## 7. ABOUT THE DATA

A calendar year is used. Board complaints files have been updated to include a summary and copies of Board minutes when that complaint was considered. A summary of all board complaints has been updated. Discipline files were updated to include also a copy of the board minutes where the complaint was discussed.

| OCCUPATIONAL THERAPY LICENSING BOARD | III. USING PERFORMANCE DATA |
|---|---|

**Agency Mission:** The mission of the Occupational Therapy Licensing Board is to protect the public by supervising occupational therapy practice to assure the safe and ethical delivery of services in Oregon.

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**The following questions indicate how performance measures and data are used for management and accountability purposes.**

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|---|---|
| **1. INCLUSIVITY** | * **Staff :** The Director works on all performance measure issues and takes all training available, and keeps the Board advised. There is a contract with a former Board member who worked on discipline cases for eight years to help on discipline case investigations.<br><br>* **Elected Officials:** The web site is available to all interested parties; board members and legislators receive performance measure reports during budget hearings.<br><br>* **Stakeholders:** All applicants and licensees have information available on the web site, and provided in newsletters and by e-mail.<br><br>* **Citizens:** Any Citizen can receive information, check the web site or contact the Board for all measures. |
| **2 MANAGING FOR RESULTS** | Complaints are prioritized and handled quickly by the Board. Applications or renewals where there is concern for public safety are given priority . Special teleconference are set up to consider emergency suspension when there is potential harm to the public. All pending cases are reviewed by the Board at each meeting. The Board looks at each kind of case to determine whether education or information is needed by licensees. Information on all public Board actions is available on the web site. The Board educates licensees in the areas it sees problems such as supervision, and scope of practice. Applications are scrutenized and issued quickly if the applicant has all the qualifications and there are no concerns about them practicing safely in Oregon. |
| **3 STAFF TRAINING** | The Director continued to keep current on all performance measure issues and reviews all material sent on changes to the current online system. The Director handles all performance measure issues, and is training the Office Specialist on KPM. |
| **4 COMMUNICATING RESULTS** | * **Staff :** The Director notifies Board members and licensees of progress made on the web site, or in newsletters. |

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| | * **Elected Officials:** Any elected official can obtain information about agency performance measures; committee members receive performance measure reports with their Agency Budgets.<br><br>* **Stakeholders:** Notices are sent to interested parties and found on the web site and newsletters.<br><br>* **Citizens:** Information is posted on the web site, or can be received by contacting the Board office. |