



## **ARIZONA BOARD OF OCCUPATIONAL THERAPY EXAMINERS**

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### **Regular Session Minutes**

**September 9, 2016**

Board Members Present:                   Quenton McCallister, Chair, OT Member  
Dr. Donald Hosenfeld, Vice Chair, OT Member  
Dana Hutchings, OT Member

Staff Present:                               Karen Whiteford, Executive Director  
Vicki Egurrola, Administrative Assistant

Legal Staff Present:                       Sabrina Khan, Assistant Attorney General

#### **1) CALL TO ORDER**

Mr. McCallister called the meeting to order at 1:33 p.m. (A recording of the meeting is available through the Board Office.)

#### **2) ROLL CALL**

The following members were present: Quenton McCallister, Dr. Donald Hosenfeld, and Dana Hutchings

#### **3) REVIEW AND DISCUSS APPROVAL OF MINUTES**

a) Regular Session Meeting Minutes of August 12, 2016

Dr. Hosenfeld moved the Board approve the meeting minutes from August 12, 2016. Ms. Hutchings seconded the motion. The motion passed 3-0.

#### **4) DECLARATION OF CONFLICTS OF INTEREST**

Ms. Hutchings recused herself from the review and approval of renewal applications for Kelsi Hess, Emilia Massimi, Tracy Mcadams, and Gayle Schoenbaum due to a professional interest in their renewals.

Mr. McCallister recused himself from agenda item 6.d.i. because he is the one who presented the information for consideration.

#### **5) REVIEW AND DISCUSS FUTURE BOARD MEETING SCHEDULE**

The Board reviewed the meeting schedule for:

- a) October 14, 2016 – Ms. Hutchings will call in for meeting.
- b) November 18, 2016 – No change.

- c) December 9, 2016 – No change.

## ITEMS FOR BOARD REVIEW, DISCUSSION AND LEGAL ACTION

### 6) REVIEW, DISCUSSION & POSSIBLE ACTION - COMPLAINTS, INVESTIGATIONS AND COMPLIANCE

- d) Initial Review of New Complaints
  - i) There are no new complaints to review.
- e) Open Complaints/Investigations
  - i) Marna Moore 16-OT- 4301 – Ms. Whiteford informed the Board that she has not obtained additional information regarding the complaint against Ms. Moore.
- f) Status of Compliance with Board Order/Approval of Board Ordered CE - Ms. Whiteford provided an update on the following items:
  - i) Casey Crothers 15-OTA-0550 – No update.
  - ii) Lena Mallant 15-OT-6337 – No update.
  - iii) Paul Breuninger 16-OT-3787 – No update.
  - iv) Micah Caudle, 16-OT-5674 – Board staff received proof of patient/guardian notification and completed CEUs on 8/18/16. Ms. Hutchings moved the Board to accept the proof of patient/guardian notification. Mr. McCallister seconded the motion. The motion passed 3-0. Mr. Caudle’s probation ends on 9/9/16.
  - v) Shelley Perry, 16-OT-5054 – Ms. Whiteford stated that a reminder notice was sent to Ms. Perry by certified mail on 9/1/16 and by email on 9/2/16. The Board office received proof of emailed patient/guardian notification on 9/7/16. On the same date, Ms. Perry requested an extension on the CEU requirement. Dr. Hosenfeld moved the Board extend Ms. Perry’s deadline two business days (to 9/12/16). Ms. Hutchings seconded the motion. The motion passed 3-0.
  - vi) Marcia Graham, 16-OT-0454 – Ms. Whiteford informed the Board that she received an email from Ms. Graham on 9/9/16, asking if the CEU requirement was for 3 hours in ethics AND billing. The Board stated she could attend a course in ethics OR billing.
  - vii) Shannon Portz Robinson, 16-OTA-5687 – Ms. Whiteford reported that there was an error in the August report and that a letter was not sent to Ms. Portz Robinson on 8/10/16. Instead, the letter directing her to send patient notification letter again and provide proof of mailing was mailed on 9/1/16.
- g) Review, Discussion, and Possible Action of Whether or Not to Open A Complaint
  - i) Michelle Lyon, OTA – Mr. McCallister recused himself from this item, which was tabled due to a lack of a quorum.

### 7) LICENSES

Substantive review, discussion, and vote regarding the applications for licenses as follows:

- a) Initial Applications (24)

First Name	Last Name	Appl Type
Suzanne	Blizzard	OT
Katelyn	Chilcote	OTA
Jordan	Cox	OT
Elizabeth	Davis	OT
Rachel	Estok	OTA
Jason	Jackson	OT

Jenna	Malander	OT
Melissa	Meikle	OT
Elaine	Mendoza	OT
Rebecca	Olack	OT
Jane	Oliver	OT
Matthew	Olivier	OT
Anne	Padgett	OTA
Riley	Palmer III	OT
Sharniece	Pierce	OT
Maria	Pietrosimone	OT
Laloma	Reicher-Kagan	OT
Hannah	Seeley	OT
Lynn	Seurer	OT
Lisa	Steffens	OT
Marissa	Stendel	OT
Jag	Taylor	OT
Holly	Thompson	OT
Erin	Trendler	OT

Dr. Hosenfeld moved the Board approve all 24 initial applications for licenses. Ms. Hutchings seconded the motion. The motion passed 3-0.

b) Initial Applications - Board Review (3)

First Name	Last Name	Appl Type	Comments
Christopher	Purdy	OT	Board Review
Shelby	Sidor	OT	Board Review
Valerie	Zaryczny	OT	Board Review

Christopher Purdy

Ms. Hutchings moved the Board approve Mr. Purdy's initial application for licensure. Mr. McCallister seconded the motion. The motion passed 3-0.

Shelby Sidor

Ms. Hutchings moved the Board approve Ms. Sidor's initial application for licensure. Dr. Hosenfeld seconded the motion. The motion passed 3-0.

Valerie Zaryczny

Dr. Hosenfeld moved the Board approve Ms. Zaryczny's initial application for licensure. Ms. Hutchings seconded the motion. The motion passed 3-0.

c) Renewal Applications (70):

License #	First Name	Last Name	License Type	Status	License Expires	Comments
3277	Francisco	Baltodano	OT	Ready	9 /2 /2016	
3311	Karli	Banks	OT	Ready	9 /13/2016	
5199	Megan	Baugh	OTA	Ready	8 /12/2016	
4993	Stephanie	Beem	OT	Ready	9 /11/2016	
5976	Lauren	Belinkoff	OT	Ready	10/19/2016	
5947	Alexa	Benson	OT	Ready	9 /14/2016	

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4650	Melissa	Brissette	OT	Inactive	9 /12/2016	
2672	Kathryn	Button	OT	Ready	12/10/2016	
3321	Mandy	Carlsen	OT	Ready	8 /15/2016	
5971	Carol	Casto	OTA	Ready	10/15/2016	
3337	Leonie	Chin-Duncan	OT	Ready	9 /12/2016	
5948	Jaclyn	Collins	OT	Ready	9 /14/2016	
2995	Raina	Dass	OT	Ready	10/14/2016	
4207	Sema	Deanda	OT	Ready	9 /14/2016	
2619	Debra	Dedecker	OT	Ready	10/25/2016	
4210	Susan	Drexler	OT	Ready	9 /14/2016	
4649	Angela	Escalante	OT	Ready	9 /7 /2016	
5924	Nancy	Faria	OTA	Ready	8 /10/2016	
0574	Jennifer	Fawcett	OT	Ready	9 /17/2016	
1364	Beverly	Fischer	OTA	Inactive	8 /21/2016	
2971	Robin	Foster	OT	Ready	9 /15/2016	
5225	Emily	Frawley	OTA	Ready	9 /16/2016	
5226	Gavin	Gigstad	OTA	Ready	9 /16/2016	
5954	Elizabeth	Hancock	OTA	Ready	9 /14/2016	
5955	Jason	Harrington	OTA	Ready	9 /14/2016	
5072	Kelsi	Hess	OT	Ready	3 /11/2016	
3701	Scott	Hurley	OTA	Ready	5 /14/2018	Back to active
2990	Jyhfang	Jehng	OT	Ready	10/14/2016	
3316	Inder	Johnson	OT	Ready	8 /15/2016	
5215	Kenneth	Jones	OTA	Ready	8 /23/2016	
4635	Tiffany	Kenny	OT	Ready	8 /15/2016	
4520	Kathryn	Kiernan	OT	Ready	9 /11/2016	
3342	Cheryl	Kingsbury	OT	Ready	10/3 /2016	
5958	Karra	Krug	OT	Ready	9 /14/2016	
5256	Lori	Lambert	OTA	Ready	10/14/2016	
2609	Cassie	Lozanovski	OT	Ready	9 /13/2016	
5243	Michael	Lutz	OTA	Ready	9 /16/2016	
3222	Emilia	Massimi	OT	Ready	6 /12/2016	
2159	Tracy	Mcadams	OT	Ready	5 /17/2016	
5960	Wade	McDowell	OT	Ready	9 /14/2016	
5990	Laurel	McMillan	OT	Ready	10/19/2016	
2665	Elizabeth	Miles	OTA	Ready	11/19/2016	
6025	Ashley	Morawski	OT	Ready	12/14/2016	
3327	Michele	Moreno	OT	Ready	9 /12/2016	
4216	Stacy	Newbury	OT	Ready	9 /14/2016	
4638	Jennifer	Nicastro	OTA	Ready	8 /15/2016	
4657	Carol	Nutter	OTA	Ready	9 /12/2016	
0573	Christine	Oagley	OT	Ready	9 /15/2016	
3784	Caroline	Palmquist	OTA	Inactive	9 /10/2016	
5259	Judy	Pechur	OT	Ready	10/14/2016	

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3765	Gerardo	Pesqueira	OT	Ready	9 /26/2016	
3309	Sandra	Phillips	OT	Ready	9 /29/2016	
4141	Johna	Pollard	OT	Ready	9 /16/2016	
0516	Mimi	Pruniski	OT	Ready	8 /13/2016	
5231	Beth	Rank	OT	Ready	9 /16/2016	
4643	Sarah	Sandoval	OT	Ready	8 /15/2016	
2925	Thomas	Scheub	OT	Ready	10/14/2016	
5233	Kathryn	Schmadeke	OT	Ready	9 /16/2016	
2986	Juliet	Sharley	OT	Ready	9 /29/2016	
5235	Ryan	Sherman	OT	Ready	9 /16/2016	
3330	Carrie	Shockley	OT	Ready	9 /12/2016	
3358	Julie	Sillaman	OT	Ready	11/7 /2016	
3821	Niti	Singhanian	OT	Ready	11/19/2016	
5966	Jairus	Sturgeon	OT	Ready	9 /14/2016	
4221	Maria	Tagle-Almario	OT	Ready	9 /14/2016	
5232	Thamara	Urrea	OTA	Ready	9 /16/2016	
4663	Kay	West	OT	Ready	9 /12/2016	
1190	Nancy	White	OTA	Ready	9 /10/2016	
2940	Robyn	Wooldridge	OTA	Ready	8 /11/2016	
4678	Melissa	Yoakam	OT	Ready	10/11/2016	

Ms. Hutchings recused herself from the review/approval of the renewal applications of Kelsi Hess, Emilia Massimi, and Tracy Mcadams. Mr. McCallister moved the Board approve the remaining 67 renewals not requiring Board review. Dr. Hosenfeld seconded the motion. The motion passed 3-0.

d) Renewal Applications – Board Review (1):

License #	First Name	Last Name	License Type	Status	License Expires	Comments
5846	Gayle	Schoenbaum	OT	Ready	5 /11/2016	Board Review

Ms. Hutchings recused herself from the review/approval of Ms. Schoenbaum’s renewal. This item was tabled to the next meeting.

e) Limited License Applications (8)

First Name	Last Name
Nicole	Black
Tate	Colyar
Jessica	Ortego
Rachel	Rodia
Susan	Roman
Jennifer	Ruiz
Sarah	White
Kelly	Whitt

Ms. Hutchings moved the Board approve the 8 limited licenses. Dr. Hosenfeld seconded the motion. The motion passed 3-0.

**8) REVIEW, DISCUSSION, AND POSSIBLE ACTION – BOARD BUSINESS AND REPORTS**

The Board may vote to go into Executive Session pursuant to A.R.S. §38-431.03(A)(3) to obtain legal advice.

- a) Executive Director’s Report – Ms. Whiteford provided an update. No action was required.
  - i) Financial Report – Nothing to report.
  - ii) Review Recent Board Staff Activities – Nothing to report.
- b) Administrative Project Status Report – Ms. Whiteford provided an update on the following items.
  - i) Policies and Procedures – No update.
  - ii) Application Automation – A request for \$40,000 to fund the e-licensing program was requested in the fiscal year 2018 budget. Ms. Whiteford stated that the price would likely be reduced by the end of the year.
  - iii) Rule Revisions – Ms. Whiteford informed the Board that the budget analyst from OSPB had not heard back from Christina Corieri, Health and Human Services Policy Advisor, regarding what she would require to determine if she would grant an exemption to the rule making moratorium for fee changes.
  - iv) Board Member Training – Ms. Whiteford verified that all Board members would have one hour of training remaining once Dr. Hosenfeld completed his CLEAR online training.
  - v) Sunset Audit – No update.
  - vi) Fiscal Year 2018 Budget – The budget request for fiscal year 2018 was submitted on 9/1/16, and included requests for e-licensing software (\$40,000) and a new multi-purpose printer (\$10,000).
- c) Other Board Business and Reports
  - i) Open Public Board Member Positions – The Board and staff discussed options for advertising the two open public Board member positions.
  - ii) Application Deadlines and Board Member Materials – Ms. Whiteford and Ms. Egurrola clarified the new application deadlines and application processing timeframes.
  - iii) Disciplinary Action Matrix – Mr. McCallister stated that he would like to expand the disciplinary action matrix to include other infractions.

**9) AGENDA ITEMS FOR NEXT MEETING – IF ANY**

- a) Disciplinary Action Matrix

**10) CALL TO THE PUBLIC**

There were not members of the public present.

**11) ADJOURNMENT**

There being no further business before the Board, the meeting adjourned at 2:02 p.m.

Respectfully submitted,

Karen Whiteford  
Executive Director