



**ARIZONA BOARD OF OCCUPATIONAL THERAPY EXAMINERS**

1740 West Adams Street, Suite 3407

Phoenix, Arizona 85007

(602) 589-8352

**Regular Session Meeting Minutes**

**October 8, 2021**

Board Members Present via Webex: Barbara Paulson, Chair, Public Member  
Charlene Marbs, Vice-Chair, Public Member  
Christopher Daly, Professional Member  
Dr. Quenton McCallister, OT Member

Board Members Absent: None

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

Legal Staff Present via Webex: Justin Larson, Assistant Attorney General

Location: Meeting was also held via Webex due to COVID-19 concerns  
Meeting number 2462 015 1815

**1) CALL TO ORDER**

Ms. Paulson called the meeting to order at 1:33 p.m.

**2) ROLL CALL**

The following members were present via Webex: Barbara Paulson, Charlene Marbs, Christopher Daly, and Quenton McCallister

**3) DECLARATION OF CONFLICTS OF INTEREST**

None

**4) REVIEW AND CONSIDER FUTURE BOARD MEETING SCHEDULE**

- a) November 12, 2021 – Ms. Paulson stated she would not be in attendance.
- b) December 10, 2021
- c) January 14, 2022

**5) PRESENTATION AND POSSIBLE DISCUSSION REGARDING OCCUPATIONAL THERAPY LICENSURE COMPACT – PRESENTED BY:**

- Dan Logsdon - Director of the National Center for Interstate Compacts, Council of State Governments (CSG)
- Shaun Conway – Senior Director, External & Regulatory Affairs, National Board for Certification in Occupational Therapy (NBCOT)
- Chuck Willmarth, CAE – Vice President, Health Policy and State Affairs, American Occupational Therapy Association

The presenters listed above, along with Matt Shafer from the CSG, presented an overview of the proposed Occupational Therapy Licensure Compact.

**6) REVIEW, CONSIDERATION, AND POSSIBLE ACTION REGARDING APPROVAL OF THE MEETING MINUTES**

- a) Regular Session Meeting Minutes of August 13, 2021  
Ms. Paulson moved the Board approve the regular session minutes of August 13, 2021. Ms. Marbs seconded the motion. The motion passed 4-0 by roll call vote.
- b) Executive Session Meeting Minutes of August 13, 2021  
Ms. Paulson moved the Board approve the executive session minutes of August 13, 2021. Mr. Daly seconded the motion. The motion passed 3-1 by roll call vote, with Ms. Marbs abstaining because she was absent from that portion of the meeting.

**7) REVIEW, CONSIDERATION, AND POSSIBLE ACTION – COMPLAINTS, INVESTIGATIONS AND COMPLIANCE**

- a) Initial Review of Complaints
  - i) Shane Johnson – OTH-002743  
Mr. Johnson was present via Webex and made a statement in response to the complaint. He stated that, at the time, eight to nine out of ten patients chose not to sign documents due to COVID risk. Instead, the form had a section where the occupational therapist could check a box stating the patient chose to not sign. Ms. Paulson asked Mr. Johnson if he was terminated. He confirmed that he had been terminated and added that he was not aware that what he did could be considered Medicare fraud. Mr. Daly asked if the employer provided any kind of procedure for patients who did not want to sign documents. Mr. Johnson responded that they did not. Mr. Daly asked Mr. Johnson if he ever submitted a note for a service he did not provide. Mr. Johnson responded that he had not. Ms. Paulson stated that she was considering dismissing the complaint because Mr. Johnson was forthright and knows that he made a bad mistake. Dr. McCallister stated he was more inclined to issue a non-disciplinary letter of concern. Dr. McCallister moved the Board issue a letter of concern to Mr. Johnson for violation of A.R.S. § 32-3401(10)(o). Mr. Larson suggested he may want to also cite A.R.S. § 32-3401(10)(x). Ms. Paulson and Mr. Daly agreed. Dr. McCallister amended his motion to include A.R.S. § 32-3401(10)(x). Ms. Marbs seconded the motion with the amendment. The motion passed 4-0 by roll call vote.
  - ii) Donald Sharp – OTA-001609  
Ms. Paulson provided a summary of the complaint against Mr. Sharp, which alleged he billed for time in which he was not in the facility. Ms. Whiteford stated she notified Mr. Sharp of the complaint and that he responded by saying that he was leaving the profession. Mr. Larson stated that A.R.S. § 32-3202 states that when a professional does not renew a license with an open complaint, that license does not expire, but is suspended until the Board resolves the complaint and investigation. He added that the Board could offer a consent agreement for a voluntary surrender. Ms. Paulson moved the Board go into executive session for legal advice. Dr. McCallister seconded the motion. The motion passed 4-0 by roll call vote. The Board entered executive session at 2:38 p.m. Upon returning to regular session at 2:45, Ms. Paulson moved the Board adopt findings of fact and conclusions of law that Mr. Sharp violated A.R.S. § 32-3401(10)(q) and offer Mr. Sharp a consent agreement for voluntary surrender of his license (OTA-001609). She added that the consent agreement is to include a stipulation that if Mr. Sharp does not accept it, the matter will proceed to a formal hearing. Dr. McCallister seconded the motion. The motion passed 4-0 by roll call vote.
- b) Review, Discussion, and Possible Action of Whether or Not to Open a Complaint
  - i) None

**8) REVIEW, CONSIDERATION, AND POSSIBLE ACTION ON APPLICATIONS FOR LICENSURE**

- a) Initial Applications – Board Review
  - i) None
- b) Renewal/Reinstatement Applications – Board Review
  - i) None

**9) CONSENT AGENDA: REVIEW, CONSIDERATION, AND POSSIBLE ACTION ON APPLICATIONS FOR LICENSURE APPROVED BY EXECUTIVE DIRECTOR**

Ms. Paulson moved the Board ratify the 43 initial applications and 113 renewal/reinstatement applications approved by the Executive Director. Mr. Daly seconded the motion. The motion passed 4-0 by roll call vote.

- a) Initial Applications Approved by Executive Director (43)

License Number	Applicant Last Name	Applicant First Name	Effective Date	Expiration Date
OTA-047009	Abeyta	Carrie	9/23/2021	9/22/2023
OTH-008634	Acompora	Ashley	9/30/2021	9/29/2023
OTH-008631	Adams	Jennifer	9/29/2021	9/28/2023
OTH-008620	Alberti-Correa	Amanda	9/23/2021	9/22/2023
OTH-008619	Babajko	Robert	9/23/2021	9/22/2023
OTH-008627	Beerling	Krista	9/27/2021	9/26/2023
OTA-047012	Benjamin	Amber	9/29/2021	9/28/2023
OTH-008626	Blumenthal	Sandra	9/23/2021	9/22/2023
OTA-047008	Boyer	Zoe	9/23/2021	9/22/2023
OTH-008628	Bustamante	Jeanette	9/29/2021	9/28/2023
OTH-008623	Calder	Deanna	9/23/2021	9/22/2023
OTA-047004	Castillo	Adriana	9/23/2021	9/22/2023
OTH-008630	Colby	Jayden	9/29/2021	9/28/2023
OTH-008614	Cootner	Samantha	9/23/2021	9/22/2023
OTA-047010	Cote	Thomas	9/29/2021	9/28/2023
OTA-047002	Cox	Kristin	9/10/2021	9/9/2023
OTH-008611	Dingman	Benjamin	9/10/2021	9/9/2023
OTH-008618	Gatchalian	Jaiden	9/23/2021	9/22/2023
OTA-047013	Gill	Chelsea	9/29/2021	9/28/2023
OTA-047003	Gonzales	Morgan	9/23/2021	9/22/2023
OTA-047014	Gonzalez	Joshua	9/29/2021	9/28/2023
OTH-008633	Grantman	Lisa	9/29/2021	9/28/2023
OTA-047007	Guerrero	Sonya	9/23/2021	9/22/2023
OTH-008615	Heckert	Celia	9/23/2021	9/22/2023
OTA-047017	Jackson	Stephanie	10/5/2021	10/4/2023
OTA-047016	Janeczko	Jennifer	9/30/2021	9/29/2023
OTA-047005	Karls	Amy	9/23/2021	9/22/2023
OTH-008613	Kaufman	Ashley	9/21/2021	9/20/2023
OTLL-000044	Kouts	Taylor	9/23/2021	1/22/2022
OTH-008635	Kron	Emily	10/5/2021	10/4/2023

License Number	Applicant Last Name	Applicant First Name	Effective Date	Expiration Date
OTH-008625	Lake	Kari	9/23/2021	9/22/2023
OTA-047006	Lopez	Carlos	9/23/2021	9/22/2023
OTH-008616	Patrignani	Victoria	9/23/2021	9/22/2023
OTH-008622	Pittek	Heather	9/23/2021	9/22/2023
OTA-047015	Plass	Stevie	9/30/2021	9/29/2023
OTH-008617	Riordan	Kristin	9/23/2021	9/22/2023
OTH-008629	Rosa	Jennifer	9/29/2021	9/28/2023
OTH-008610	Ruth	Claire	9/10/2021	9/9/2023
OTH-008632	Schaafsma	Hannah	9/29/2021	9/28/2023
OTH-008621	Strzelczyk	Courtney	9/23/2021	9/22/2023
OTH-008624	Thomas	Alexis	9/23/2021	9/22/2023
OTH-008612	Tobergte	Kimberly	9/13/2021	9/12/2023
OTA-047011	Tran	Mai	9/29/2021	9/28/2023

b) Renewal/Reinstatement Applications Approved by Executive Director (113)

License Number	Applicant Last Name	Applicant First Name	Effective Date	Expiration Date	Application Type
OTH-007961	Adair	Emily	10/29/2021	10/28/2023	Renewal
OTH-007920	Addario	Brooke	9/13/2021	9/12/2023	Renewal
OTH-007973	Allenbach	Simone	11/13/2021	11/12/2023	Renewal
OTH-003459	Anderson	Cayla	9/17/2021	9/16/2023	Renewal
OTH-006295	Andrus	Anna	9/21/2021	9/20/2023	Renewal
OTA-046710	Avina	Melissa	9/13/2021	9/12/2023	Renewal
OTH-007184	Bacani	Michelle	10/16/2021	10/15/2023	Renewal
OTA-006296	Beale	Karen	9/21/2021	9/20/2023	Renewal
OTA-007186	Beirne	Rachel	10/16/2021	10/15/2023	Renewal
OTH-007975	Bennett	Shad	11/13/2021	11/12/2023	Renewal
OTA-005608	Biggs	Tracy	10/21/2021	10/20/2023	Renewal
OTA-007149	Brazovan	Daniela	9/11/2021	9/10/2023	Renewal
OTH-007869	Brown	Dustin	9/29/2021	9/28/2023	Reinstatement
OTA-007191	Butler	Nicole	10/16/2021	10/15/2023	Renewal
OTH-007274	Calilung	Amelia	12/11/2021	12/10/2023	Renewal
OTH-007923	Carr	Amy	9/13/2021	9/12/2023	Renewal
OTH-003148	Chapin-Tsai	Diana	11/17/2021	11/16/2023	Renewal
OTA-005617	Chavez	Heather	10/21/2021	10/20/2023	Renewal
OTH-006330	Christman	Justin	10/9/2021	10/8/2023	Renewal
OTH-001128	Clement	Mary	10/24/2021	10/23/2023	Renewal
OTH-001155	Cole	Michelle	11/22/2021	11/21/2023	Renewal
OTH-007153	Concha-Chavez	Alyssa	9/11/2021	9/10/2023	Renewal
OTA-006331	Corgan	Staci	10/9/2021	10/8/2023	Renewal
OTA-004972	DePalma	Lorissa	11/10/2021	11/9/2023	Renewal

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OTH-003581	Dillard	Rebecca	10/14/2021	10/13/2023	Renewal
OTH-001811	Dorf	Eric	11/17/2021	11/16/2023	Renewal
OTA-001723	Fiske	Janette	9/23/2021	9/22/2023	Renewal
OTH-003159	Flanagan	Debra	10/14/2021	10/13/2023	Renewal
OTH-001958	Foutz	Michele	11/13/2021	11/12/2023	Renewal
OTA-005607	Fraire	Sarah	9/20/2021	9/19/2023	Renewal
OTH-002813	Fritz	Kimberly	10/15/2021	10/14/2023	Renewal
OTA-007201	Garcia	Ana	10/16/2021	10/15/2023	Renewal
OTA-004971	Garza	Roberta	11/9/2021	11/8/2023	Renewal
OTH-007202	Gaskin	Byron	10/16/2021	10/15/2023	Renewal
OTA-007250	Gasparro	Vito	11/4/2021	11/3/2023	Renewal
OTA-006304	Genereux	Crystal	9/21/2021	9/20/2023	Renewal
OTH-007949	Gubka	Samantha	10/7/2021	10/6/2023	Renewal
OTA-001691	Guy	Tifany	10/23/2021	10/22/2023	Renewal
OTA-001659	Hanson	Helene	9/23/2021	9/22/2023	Renewal
OTA-004944	Holly	Katie	10/17/2021	10/16/2023	Renewal
OTH-005659	Hussey	Holly	12/16/2021	12/15/2023	Renewal
OTA-006307	Hutchinson	Stacy	9/21/2021	9/20/2023	Renewal
OTH-007971	Isacsson	Ivar	10/29/2021	10/28/2023	Renewal
OTH-007161	Jerich	Tricia	9/11/2021	9/10/2023	Renewal
OTH-002031	Johnson	Lynn	11/14/2021	11/13/2023	Renewal
OTH-007208	Jusko	Julia	10/16/2021	10/15/2023	Renewal
OTA-001268	Kempf	Donna	9/18/2021	9/17/2023	Renewal
OTH-001098	Kent	Stephanie	9/30/2021	9/29/2023	Renewal
OTH-004454	Kirtikar	Sangeeta	10/9/2021	10/8/2023	Renewal
OTH-007211	Kirwan	Katie	10/16/2021	10/15/2023	Renewal
OTA-004917	Labrie	Jennifer	9/19/2021	9/18/2023	Renewal
OTH-007981	LaForme	Michelle	11/13/2021	11/12/2023	Renewal
OTH-007173	Larson	Lauren	11/13/2021	11/12/2023	Renewal
OTH-007936	Lassman	Anna	9/13/2021	9/12/2023	Renewal
OTH-007227	Lott	Jenna	10/16/2021	10/15/2023	Renewal
OTH-007938	Maclean	Ann	9/13/2021	9/12/2023	Renewal
OTA-004919	Magallanes	Vanessa	9/19/2021	9/18/2023	Renewal
OTH-001578	Mcnamara	Pamela	11/29/2021	11/28/2023	Renewal
OTA-007167	Medina	Gabriel	9/11/2021	9/10/2023	Renewal
OTH-007218	Mendenhall	Shannon	10/16/2021	10/15/2023	Renewal
OTA-046727	Molina	Claudia	10/11/2021	10/10/2023	Renewal
OTH-002812	Montgomery	Donna	9/17/2021	9/16/2023	Renewal
OTA-005585	Montoya	Sahra	9/16/2021	9/15/2023	Renewal
OTA-006313	Muntz	Justine	9/21/2021	9/20/2023	Renewal

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OTA-002046	Naylor	Betty	11/5/2021	11/4/2023	Renewal
OTH-007182	Norris	Jessica	9/21/2021	9/20/2023	Renewal
OTA-004983	Olsen	Rita	11/21/2021	11/20/2023	Renewal
OTH-007962	Olson	Karina	10/29/2021	10/28/2023	Renewal
OTA-004934	Olvey	Angelina	9/19/2021	9/18/2023	Renewal
OTH-005625	Orth	Kelly	10/21/2021	10/20/2023	Renewal
OTH-004467	Osses	Gary	11/13/2021	11/12/2023	Renewal
OTH-003161	Pehrson	Ty	11/13/2021	11/12/2023	Renewal
OTH-004941	Perkins	Amy	10/17/2021	10/16/2023	Renewal
OTH-002800	Peterson	Deanne	9/17/2021	9/16/2023	Renewal
OTH-003166	Pierson	Bernadette	11/17/2021	11/16/2023	Renewal
OTH-007221	Pleiter	Shari	10/16/2021	10/15/2023	Renewal
OTA-004957	Pool	Erik	11/13/2021	11/12/2023	Renewal
OTH-006417	Rae	Lauren Lee	12/14/2021	12/13/2023	Renewal
OTH-007226	Rishi	Himangini	10/16/2021	10/15/2023	Renewal
OTA-005591	Roth	Candice	9/16/2021	9/15/2023	Renewal
OTH-004019	Rowser	Christine	10/15/2021	10/14/2023	Renewal
OTH-000770	Sage Bartlett	Susan	10/7/2021	10/6/2023	Renewal
OTH-007228	Sahd	Blake	10/16/2021	10/15/2023	Renewal
OTH-003589	Sahoo	Prakash	10/17/2021	10/16/2023	Renewal
OTH-003587	Sahoo	Seema	10/17/2021	10/16/2023	Renewal
OTH-001427	Sailer	Kristie	9/21/2021	9/20/2023	Renewal
OTH-006373	Sarmiento	Guadalupe	11/16/2021	11/15/2023	Renewal
OTA-004965	Schuman	Andrew	10/14/2021	10/13/2023	Renewal
OTH-006992	Schwartz	Sidney	10/2/2021	10/1/2023	Renewal
OTH-001783	Shearon	Tania	11/18/2021	11/17/2023	Renewal
OTH-007230	Sherry	Lauren	10/16/2021	10/15/2023	Renewal
OTA-001335	Shipley	Sharla	10/23/2021	10/22/2023	Renewal
OTH-001457	Skodiak	Nancy	10/23/2021	10/22/2023	Renewal
OTH-005618	Smalenberg	Julea	10/21/2021	10/20/2023	Renewal
OTH-007989	Smith	Emily	11/25/2021	11/24/2023	Renewal
OTH-007954	Smith	Stephanie	10/11/2021	10/10/2023	Renewal
OTH-007987	Solverson	Katelyn	11/25/2021	11/24/2023	Renewal
OTH-007948	Struthers	Sarah	10/1/2021	9/30/2023	Renewal
OTA-007237	Todd	Susanna	10/31/2021	10/30/2023	Renewal
OTH-006381	Uphoff	Courtney	11/16/2021	11/15/2023	Renewal
OTA-007174	Valenzuela	Bianca	9/11/2021	9/10/2023	Renewal
OTH-007839	VanRuff	Alina	9/20/2021	9/19/2023	Renewal
OTH-004474	Verelius	Jenna	11/13/2021	11/12/2023	Renewal
OTA-006386	Viado	Larizza	11/16/2021	11/15/2023	Renewal

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OTH-006383	Wang	Jennifer	11/16/2021	11/15/2023	Renewal
OTA-003086	Webster	Barbara	10/18/2021	10/17/2023	Renewal
OTA-006343	Wells	Susan	10/9/2021	10/8/2023	Renewal
OTH-004989	Westlin	Linda	11/21/2021	11/20/2023	Renewal
OTH-002458	Williams	Anne	10/12/2021	10/11/2023	Renewal
OTH-003568	Williams	Connie	10/14/2021	10/13/2023	Renewal
OTA-006184	Wilson	Arra-Mela	9/29/2021	9/28/2023	Reinstatement
OTH-007306	Wolfe	Elizabeth	12/11/2021	12/10/2023	Renewal
OTH-002427	Young	Jeri	10/12/2021	10/11/2023	Renewal

**10) REVIEW, CONSIDERATION, AND POSSIBLE ACTION – OUT-OF-STATE REGISTRATION FEE ESTABLISHMENT AND RULEMAKING IN RESPONSE TO PASSAGE OF HOUSE BILL 2454 (TELEHEALTH/REGISTRATION)**

Ms. Whiteford informed the Board that out-of-state registration cannot be offered until the Board establishes fees for the registrations. Mr. Larson stated the Board should consider the cost of application processing compared to applications for licensure. Ms. Whiteford stated that there would be additional steps in processing registrations, including, but not limited to additional research on the status of applicants’ licenses in other states, the verification of professional liability insurance, and the verification of statutory agent assignment. She added that there could also be a financial implication of setting up and maintenance of the system to receive such applications. Dr. McCallister moved the Board set the fees for out-of-state telehealth initial registrations and annual registration updates to \$300.00 for occupational therapists and \$225 for occupational therapy assistants.

**11) REVIEW, CONSIDERATION, AND POSSIBLE ACTION – UPDATE ON RULEMAKING IN RESPONSE TO PASSAGE OF HOUSE BILL 2585 (FINGERPRINTING)**

Ms. Whiteford informed the Board that the FBI review of HB 2585 must be completed before the rules can be amended to require fingerprint clearance cards.

**12) REVIEW, CONSIDERATION, AND POSSIBLE ACTION – BOARD BUSINESS AND REPORTS**

- a) Financial Report  
 Ms. Whiteford stated that the cash flow spreadsheet must be updated to reflect increased expenditures and projected revenue.
- b) Review of 2021 Legislative Update Memo  
 Ms. Larson stated he was available to answer any questions regarding the legislative update memo.
- c) Review of Recent Board Staff Activities  
 None
- d) Update on Transition to Thentia for Online Licensing  
 Ms. Whiteford stated she has not received the results of ASET’s evaluation of Thentia.
- e) Statistics
  - i) 4,335 Current Active Licensees
    - (1) 2,921 Occupational Therapist
    - (2) 1,381 Occupational Therapy Assistant
    - (3) 25 Occupational Therapist Limited License
    - (4) 8 Occupational Therapy Assistant Limited License
  - ii) 89 Current Inactive Licensees
    - (1) 67 Occupational Therapist
    - (2) 22 Occupational Therapy Assistant

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- iii) 2 active consent agreements – Next item due 12/4/2021
- iv) 1 pending consent agreement
- v) 5 open investigations
- e) Open Board Member Positions – Status Update  
No update.
- f) Board Website Updates  
No update.

**13) AGENDA ITEMS FOR NEXT MEETING**

None

**14) CALL TO THE PUBLIC**

No members of the public stepped forward to speak.

**15) ADJOURNMENT**

There being no further business, the Board adjourned at 3:16 p.m.