



STATE OF ARIZONA  
BOARD OF BEHAVIORAL HEALTH EXAMINERS  
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DOUGLAS A. DUCEY  
Governor

TOBI ZAVALA  
Executive Director

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BOARD OF BEHAVIORAL HEALTH EXAMINERS MEETING MINUTES  
August 3, 2018

Members Present: Kimberly Bailey, Bradley Barnett, Chip Coffey, Mary Coonrod, Cedric Davis, Gary Goodwin, Meaghan Kramer, Heidi Quinlan, Jerri Shields

Members Absent: Gerald Szymanski

Staff Present: Tobi Zavala, Executive Director; Marc Harris, A.A.G., Donna Dalton, Deputy Director; Joey Ordonez, Assistant Director; Charlene Garcia, Operations Manager:

**1. Call to Order**

A meeting of the Arizona Board of Behavioral Health Examiners was called to order on August 3, 2018 at 9:06 a.m. with Mr. Coffey presiding.

**2. Roll Call**

See above.

**3. Minutes: review, consideration and action**

*A. May 4, 2018, general meeting minutes*

Dr. Davis moved, seconded by Ms. Shields, to approve the general meeting minutes for the May 4, 2018 meeting as submitted. The motion passed unanimously.

*B. May 9, 2018, teleconference meeting minutes*

Ms. Shields moved, seconded by Ms. Coonrod, to approve the teleconference meeting minutes for the May 9, 2018 meeting as submitted. The motion passed unanimously. Dr. Davis and Ms. Kramer abstained.

*C. May 29, 2018, teleconference meeting minutes*

Ms. Shield moved, seconded by Ms. Coonrod, to approve the teleconference meeting minutes for the May 29, 2018 meeting as submitted. The motion passed unanimously. Ms. Kramer abstained.

*D. July 13, 2018, general meeting minutes*

Tabled due to lack of quorum of members to vote.

*E. July 13, 2018, executive session minutes/agenda 8B*

Tabled due to lack of quorum of members to vote.

**4. Notification of Deficiencies**

Jennifer Wagner appeared from the list of 5 and addressed the Board. Louise Bietendorf could not be reached at the phone number provided.

**5. Consent Agenda: review, consideration and action**

*A. Cases recommended for dismissal*

*1. 2018-0074, Debra Stutz-Middleton, LISAC-11851 and LCSW-12486*

Ms. Zavala summarized information regarding the results of the Board's investigation.

The complainant appeared and addressed the Board.

The professional and her attorney, Michelle Thompson, appeared and addressed the Board.

Following review and discussion by members, Ms. Bailey moved, seconded by Dr. Davis, to dismiss the complaint. The motion passed unanimously.

**B. Cases recommended for dismissal with a letter of concern**

*N/A*

**C. Cases recommended for release from consent agreements**

1. *2011-0085, Don Burchfield, LPC-1969 (active-restricted)*
2. *2014-0070, Stephanie Crawford, LPC-10292 (active-restricted)*
3. *2017-0101, Aaron Foster, LAC-16667 (active-restricted)*
4. *2015-0011, Cynthia Potter, LASAC-13184 (active-restricted)*

Following discussion, Dr. Davis moved, seconded by Ms. Shields, to approve the consent agenda item 5(C). The motion passed unanimously. Ms. Coonrod recused.

**D. Cases recommended for release from non-disciplinary consent agreement.**

1. *2017-0096, Tammi Brandon, LPC-12381 and LISAC-11695*

Following discussion, Dr. Davis moved, seconded by Ms. Shields, to approve the consent agenda item 5(D). The motion passed unanimously. Ms. Coonrod recused.

**E. Cases recommended for opening a complaint and acceptance of a proposed signed consent agreement.**

*N/A*

**6. Administrative Hearings**

*N/A*

**7. Formal Interviews**

**A. *2018-0050, David Stephensen, LCSW-11293***

Marc Harris, A.A.G., appeared on behalf of the Board.

Ms. Zavala provided a summary of the matter.

The complainant was properly noticed, but failed to appear.

Mr. Stephensen was sworn in and testified.

Following review and discussion by members, Mr. Goodwin moved, seconded by Ms. Quinlan, to dismiss the complaint. The motion carried with Ms. Bailey, Mr. Coffey, Ms. Kramer and Ms. Shields opposed.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE		X		X	X	X		X		
NAY	X		X				X		X	
Absent										X

*The Board took a break at 10:18 a.m., reconvening its public meeting at 10:28 a.m.*

**8. Complaints and other disciplinary matters: review, consideration and action**

**A. *2018-0106, Sarina Begay Otero, LCSW-11850***

Ms. Zavala summarized the results of the Board's investigation.

The complainant was properly noticed, but failed to appear.

The professional appeared and addressed the Board.

Following review and discussion by members, Dr. Davis moved, seconded by Ms. Shields, to dismiss the complaint. The motion passed unanimously.

*B. 2018-0090, Alana Brunacini, LAC-14038*

Ms. Zavala summarized the results of the Board's investigation.

The complainant was properly noticed, but failed to appear.

The professional and her attorney, Amanda Chua, appeared and addressed the Board.

Following review and discussion by members, Dr. Davis moved, seconded by Ms. Shields, to dismiss the complaint. The motion passed unanimously.

*C. Mark Conway, LAC Applicant*

Mr. Ordonez summarized the results of the Board's investigation.

The applicant appeared and addressed the Board.

Following review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to find the following violations:

- A.R.S. § 32-3251(16)(b), Using fraud or deceit in connection with rendering services as a licensee or in establishing qualifications pursuant to this chapter.
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

Following further discussion, Ms. Shields moved, seconded by Dr. Davis, to open a complaint and offer a consent agreement for a decree of censure, and if not signed, to deny the application based on a finding of unprofessional conduct pursuant to A.R.S. § 32-3275(A)(6). The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

*D. Amy Davidson, LMSW-12812 (active-restricted)*

Ms. Zavala summarized the results of the Board's investigation.

The professional appeared and addressed the Board.

Following review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to open a complaint for further investigation. The motion passed unanimously. Mr. Coffey recused.

*E. 2018-0078, Kelly Hughes-Halpin, LMSW-14038*

Ms. Zavala summarized the results of the Board's investigation.

The professional's attorney, Steve Myers, appeared and addressed the Board.

Following review and discussion by members, Dr. Davis moved, seconded by Mr. Barnett, to accept the modified consent agreement. The motion passed unanimously. Mr. Coffey recused.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X		X	X	X	X	X	X	
NAY										
Absent			recused							X

*F. 2018-0108, Jana-Lee Leineweber, LMSW-15870*

Ms. Zavala summarized the results of the Board's investigation.

The complainant was properly noticed, but failed to appear.

The professional appeared and addressed the Board.

Following review and discussion by members, Dr. Davis moved, seconded by Mr. Barnett, to dismiss the complaint. The motion passed unanimously.

*G. 2018-0109, Melina O'Brien, LASAC-15149*

Mr. Ordonez summarized the results of the Board's investigation.

The complainant appeared and addressed the Board.

The professional and her attorneys, Priyanka Desai and Mike Goldberg, appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to find the following violations:

- A.R.S. § 32-3251(16)(c)(ii), Making any oral or written misrepresentation of a fact by an applicant or licensee in any statements provided during an investigation or disciplinary proceeding by the board.
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.
- A.R.S. § 32-3251(16)(v), Engaging in any sexual contact between a licensee and a client or former client

The motion passed unanimously.

Following further discussion by members, Ms. Shields moved, seconded by Mr. Barnett, to offer the professional a consent agreement for the voluntary surrender of the professional's license and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

Following further discussion by members, Mr. Coffey moved, seconded by Ms. Shields to refer the case to law enforcement. The motion passed unanimously.

*H. 2018-0082, Shannon McQuaid, LISAC-1596 and LMFT-10032*

Ms. Zavala summarized the results of the Board's investigation.

The professional appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Quinlan moved, seconded by Dr. Davis, find the

following violations:

- A.R.S. § 32-3251(16)(c)(i), Making any oral or written misrepresentation of a fact by an applicant or licensee to secure or attempt to secure the issuance or renewal of a license
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

The motion passed unanimously.

Following further discussion, Ms. Shields moved, seconded by Mr. Barnett, to consolidate complaints 2018-0082 and 2018-0088. The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

*I. 2018-0088, Shannon McQuaid, LISAC-1596 and LMFT-10032*

Ms. Zavala summarized the results of the Board's investigation.

The professional appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Quinlan moved, seconded by Dr. Davis, find the following violations:

- A.R.S. § 32-3251(16)(c)(i), Making any oral or written misrepresentation of a fact by an applicant or licensee to secure or attempt to secure the issuance or renewal of a license
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

The motion passed unanimously.

Following further discussion, Ms. Quinlan moved, seconded by Ms. Shields, to offer a consent agreement that stipulates the following:

- The professional's license shall be placed on probation for 12 months
- The professional shall complete 12 clock hours of continuing education in Clinical Supervision Training
- The professional shall complete a pre-approved 3 semester credit hour graduate level course in behavioral health ethics

and if not signed, to invite the professional to participate in a formal interview and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

*J. Roy Rockenbach, LAC Applicant*

Mr. Ordonez summarized the results of the Board's investigation.

The applicant appeared and addressed the Board.

Following review and discussion by members, Ms. Shields moved, seconded by Ms. Kramer, to open a

complaint and find the following violation:

- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

The motion carried with Mr. Goodwin opposed.

Following further discussion, Ms. Bailey moved, seconded by Ms. Shields, to offer a consent agreement that stipulates the following:

- The professional's license shall be placed on probation for 24 months
- Early release available after 12 months at the recommendation of the clinical supervisor
- The professional shall receive clinical supervision no less than three hours monthly
- Clinical supervision focusing on behavioral health ethics, boundaries, behavioral health training, personal conduct, stress management and conflict management
- The professional shall work in an agency licensed by Department of Health Services

and if not signed, to deny the application based on a finding of unprofessional conduct pursuant to A.R.S. § 32-3275(A)(6). The motion carried with Mr. Goodwin opposed.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X		X	X	X	
NAY						X				
Absent										X

*The Board took a break at 12:12 p.m., reconvening its public meeting at 12:52 p.m.*

*K. 2018-0081, Deanaha Romero, LAC-15432 and LPC applicant*

Ms. Zavala summarized the results of the Board's investigation.

The professional appeared and addressed the Board.

Following review and discussion by members, Ms. Quinlan moved, seconded by Ms. Shields, find the following violations:

- A.R.S. § 32-3251(16)(c)(i), Making any oral or written misrepresentation of a fact by an applicant or licensee to secure or attempt to secure the issuance or renewal of a license
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

The motion passed unanimously.

Following further discussion, Ms. Quinlan moved, seconded by Mr. Barnett, to deny the Licensed Professional Counselor application based on a finding of unprofessional conduct pursuant to A.R.S. § 32-3275(A)(6) and issue a letter of concern regarding misrepresentation of clinical supervision documentation. The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

*L. 2018-0107, Chi Stavros, LCSW-12659*

Ms. Zavala summarized the results of the Board's investigation.

The complainant was properly noticed, but failed to appear.

The professional appeared and addressed the Board.

Following review and discussion by members, Dr. Davis moved, seconded by Ms. Shields, to dismiss the complaint. The motion passed unanimously.

*M. 2018-0089, Karen Williams, LAC-15612 and LPC applicant*

Ms. Zavala summarized the results of the Board’s investigation.

The professional appeared and addressed the Board.

Following review and discussion by members, Ms. Quinlan moved, seconded by Mr. Barnett, find the following violations:

- A.R.S. § 32-3251(16)(c)(i), Making any oral or written misrepresentation of a fact by an applicant or licensee to secure or attempt to secure the issuance or renewal of a license
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

Following further discussion, Ms. Shields moved, seconded by Dr. Davis, to deny the Licensed Professional Counselor application based on a finding of unprofessional conduct pursuant to A.R.S. § 32-3275(A)(6) and issue a letter of concern regarding misrepresentation of clinical supervision documentation. The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

*N. 2018-0104, Jennifer Woodson, LMSW-13540 and LCSW applicant*

Mr. Ordonez summarized the results of the Board’s investigation.

The professional appeared and addressed the Board.

Following review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to find the following violations:

- A.R.S. § 32-3251(16)(c)(i), Making any oral or written misrepresentation of a fact by an applicant or licensee to secure or attempt to secure the issuance or renewal of a license
- A.R.S. § 32-3251(16)(l), Engaging in any conduct, practice or condition that impairs the ability of the licensee to safely and competently practice the licensee's profession.

Following further discussion, Ms. Shields moved, seconded by Dr. Davis, to deny the Licensed Clinical Social Worker application based on a finding of unprofessional conduct pursuant to A.R.S. § 32-3275(A)(6) and issue a letter of concern regarding misrepresentation of clinical supervision documentation. The motion passed unanimously.

	Kimberly Bailey	Brad Barnett	Chip Coffey	Mary Coonrod	Cedric Davis	Gary Goodwin	Meaghan Kramer	Heidi Quinlan	Jerri Shields	Gerald Szymanski
AYE	X	X	X	X	X	X	X	X	X	
NAY										
Absent										X

Following further review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to open a complaint on applicant’s clinical supervisor. The motion passed unanimously.

Following further review and discussion by members, Ms. Shields moved, seconded by Mr. Barnett to refer the case to the Arizona Board of Psychologist Examiners regarding applicant's clinical supervisor. The motion passed unanimously.

**9. Assistant Attorney General's Report: Marc Harris, A.A.G.**

A. *2018 Legislative Update*

Tabled

B. *Discussion regarding Board Members motions*

Tabled

*The Board took a break at 2:37 p.m., reconvening its public meeting at 2:48 p.m.*

**10. Temporary licenses: review, consideration and action**

N/A

**11. Applications for licensure and educational programs: review, consideration and action**

A. *Review, consideration, and possible action regarding applications for licensure*

*Counseling*

Ms. Shields moved, seconded by Dr. Davis, to approve 26 applicants as Licensed Associate Counselors, 3 applicants as Licensed Associate Counselors by endorsement, 22 applicants as Licensed Professional Counselors, and 10 applicants as Licensed Professional Counselors by endorsement. The motion passed unanimously.

Ms. Shields moved, seconded by Mr. Barnett, to deny 2 applications based on failure to pass the required examination. The motion passed unanimously.

*Marriage and Family Therapy*

Mr. Barnett moved, seconded by Ms. Shields, to approve 1 applicant as a Licensed Associate Marriage and Family Therapist, 3 applicants as Licensed Marriage and Family Therapists, and 3 applicants as Licensed Marriage and Family Therapists by endorsement. The motion passed unanimously.

*Social Work*

Dr. Davis moved, seconded by Ms. Shields, to approve 12 applicants as Licensed Clinical Social Workers, 5 applicants as Licensed Clinical Social Workers by endorsement, and 15 applicants as Licensed Master Social Workers. The motion passed unanimously.

Dr. Davis moved, seconded by Mr. Barnett, to deny 4 applications based on failure to pass the required exam, and 2 applications based on failure to take the required exam. The motion passed unanimously.

*Substance Abuse*

Ms. Quinlan moved, seconded by Ms. Shields, to approve 3 applicants as Licensed Associate Substance Abuse Counselors. The motion passed unanimously.

Ms. Quinlan moved, seconded by Ms. Shields, to deny 2 applications based on failure to pass the required examination, and 1 application based on failure to take the required examination. The motion passed unanimously.

**12. Report from Chair**

A. *Summary of current events*

No Report.

**13. Report from the Treasurer**

A. *Review, consideration, and possible action regarding Year End financial report*

Tabled



*B. Review, consideration, and possible action regarding July financial report*  
Tabled

**14. Report from the Executive Director and/or staff**

*A. General Agency Operations*  
No Report

*B. Review, consideration, and possible action regarding scheduling a special Board meeting*  
Ms. Zavala asked the members to consider beginning the meeting at 8:00 AM on September 14<sup>th</sup> to ensure there would be plenty of time to conduct a Formal Hearing in lieu of calling an additional Board meeting. The members agreed.

*C. Review, consideration, and possible action regarding 2019 meeting calendar*  
Following review and discussion by members, Dr. Davis moved, seconded by Ms. Coonrod, to approve the proposed 2019 meeting calendar as presented. The motion passed unanimously.

*D. Discussion regarding website*  
Ms. Dalton shared with the members that the Board's website was compromised and that the FBI was aware of the situation. Additionally, Ms. Dalton explained to the members that there was no breach of any personal information of the licensees or applicants.

*E. Discussion regarding ASWB Leadership Conference*  
Ms. Zavala shared that it was an honor that she and Ms. Shields were able to attend the ASWB Leadership conference that was fully sponsored by ASWB.

*F. Discussion regarding Southwestern School for Behavioral Health Studies conference*  
Ms. Zavala notified members that she and Mr. Ordonez would be presenting at the Southwestern School for Behavioral Health Studies annual conference in Tucson. In addition, the Board will have a booth to field questions from the public.

*G. Discussion regarding the digitization of records*  
Ms. Dalton informed members that the digitization process was almost complete. She reminded members that the Board continues to strive to be completely paperless.

*H. Review, consideration, and possible action regarding templates for treatment plans and progress notes*  
Following review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to approve the treatment plan and progress note templates modified by members. The motion passed unanimously.

*I. Review, consideration, and possible action regarding the DUI policy*  
Following review and discussion by members, Ms. Shields moved, seconded by Dr. Davis, to approve the proposed DUI policy as presented. The motion passed unanimously.

*J. Discussion regarding the scope of practice for a LASAC/LISAC*  
Tabled

*K. Discussion regarding Regulation vs. Deregulation*  
Members discussed being pro-active in working with the associations on whether there was a need for rules and/or statute changes. Ms. Zavala shared with members that an email was being sent to the four associations regarding any feedback they may have.

*L. Discussion regarding emails in client records*  
Tabled

*M. Discussion regarding life coaches*  
Members discussed the concern that some life coaches may be also doing psychotherapy. Ms. Zavala

informed members that there is a process in place if staff suspected that an individual was practicing psychotherapy and did not have the appropriate credential.

N. *Discussion regarding investigative reports*  
Tabled

**15. Request for extension of inactive status: review, consideration and action**

A. *Amena Rathur, LCSW-12575 and LMFT-10382 (inactive)*

Following review and discussion by members, Dr. Davis moved, seconded by Ms. Quinlan, to approve the request for an extension of inactive status. The motion passed unanimously.

**16. National and regional news regarding the profession(s)**

N/A

**17. Future agenda items**

- A. *Discussion regarding Clinical supervision exemption requests for size and geographic location pursuant to R4-6-212.01*
- B. *Discussion regarding court appointed and therapeutic interventionist complaints*
- C. *Discussion regarding end of the year numbers*

**18. Call for public comment**

None

**19. Establishment of future meeting dates**

*The next regular meeting is scheduled for Friday, September 14, 2018, at 8:00 a.m., at 1740 W. Adams St., Room C.*

**20. Adjournment**

Ms. Shields moved, seconded by Mr. Barnett, to adjourn. The motion passed unanimously and the meeting was adjourned at 4:02 p.m.

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Heidi Quinlan  
Secretary/Treasurer

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Date