



STATE OF ARIZONA  
BOARD OF BEHAVIORAL HEALTH EXAMINERS  
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KATIE HOBBS  
Governor

TOBI ZAVALA  
Executive Director

BOARD OF BEHAVIORAL HEALTH EXAMINERS  
MEETING MINUTES  
February 9, 2024

Members Present: Kimberly Bailey, Robert Charles, Mary Coonrod, Leanette Henagan, Polly Knape, Adalesa Meek, Diane Palacios, Antwan Trotter

Members Absent: Mark Shen

Staff Present: Tobi Zavala, Executive Director; Mona Baskin, A.A.G., Erin Yabu, Deputy Director; Jarett Carver, Investigations Manager

**1. Call to Order**

A meeting of the Arizona Board of Behavioral Health Examiners was called to order on February 9, 2024 at 9:01 a.m. at 1740 West Adams Street, Board Room C, Phoenix, Arizona 85007 with Ms. Meek presiding.

**2. Roll Call**

See above.

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

*A. December 8, 2023, general meeting minutes*

Ms. Palacios moved, seconded by Ms. Henagan, to approve the general meeting minutes for the December 8, 2023 meeting as submitted. The motion passed unanimously. Mr. Trotter abstained.

*B. January 12, 2024, general meeting minutes*

Tabled due to lack of quorum of members to vote.

*C. January 12, 2024, executive session minutes/agenda item 7D*

Tabled due to lack of quorum of members to vote.

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

A. Cases recommended for dismissal

1. 2023-0231, Kristen Brown, LCSW-17917
2. 2024-0003, Carrienne Connors, LCSW-19411
3. 2023-0189, Winter Groeschl, LPC-20131
4. 2024-0137, Kali Kenar, LPC-17935
5. 2023-0210, Erin Moore, LCSW-16806
6. 2024-0075, Derek Reece, LCSW-19743

Following discussion, Ms. Palacios moved, seconded by Ms. Bailey, to approve the consent agenda item 4(A)(5). The motion passed unanimously. Ms. Meek recused.

For consent agenda item 4(A)(3), Ms. Palacios disclosed she knows the licensee in a professional capacity but she can review and vote on the case objectively.

Following discussion, Ms. Henagan moved, seconded by Mr. Trotter, to approve the consent agenda item 4(A)(2-4, 6). The motion passed unanimously.

1. 2023-0231, Kristen Brown, LCSW-17917  
 Ms. Zavala summarized the Board’s investigation.

The complainant appeared telephonically and addressed the Board.

The professional appeared telephonically and addressed the Board.

Following discussion, Ms. Henagan moved, seconded by Ms. Knape, to dismiss the complaint. The motion passed unanimously.

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

1. 2023-0224, Santiago Ayala, LAC-16868
2. 2023-0219, Denise Massie, LPC-10246

For consent agenda item 4(B)(1), Ms. Palacios disclosed she knows the complainant in a professional capacity but she can review and vote on the case objectively.

Following discussion, Ms. Bailey moved, seconded by Ms. Palacios, to approve the consent agenda item 4(B). The motion passed unanimously.

C. Cases recommended for opening a complaint and dismissing with a letter of concern

N/A

D. Cases recommended for acceptance of a proposed signed non-disciplinary consent agreement.

1. 2024-0001, Neal Holden, LCSW-17988
2. 2023-0148, Michael Kolasa, LMFT-15447
3. 2023-0225, 2023-0218, Stephanie Speake, LAC-17610

Following discussion, Ms. Palacios moved, seconded by Mr. Trotter, to approve the consent agenda item 4(D). The motion passed unanimously.

E. Cases recommended for opening a complaint and acceptance of a proposed signed non-disciplinary consent agreement.

N/A

F. Cases recommended for acceptance of a proposed signed disciplinary consent agreement.

N/A

G. Cases recommended for opening a complaint and acceptance of a proposed signed disciplinary consent agreement.

1. Ruth Santiago, LMSW-20963

Following discussion, Ms. Coonrod moved, seconded by Ms. Bailey, to approve the consent agenda item 4(G). The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

H. Cases recommended for opening a complaint and denying for unprofessional conduct.

N/A

I. Cases recommended for release from consent agreements.

1. 2022-0166, Santos Gonzales, LCSW-19185 (active-restricted)
2. 2023-0130, Jonathan Haley, LASAC-15316
3. 2022-0147, Wanza Hinton, LASAC-15364 (active-restricted)

4. 2024-0019, Tekeysha Mack, LMSW-19164
5. 2023-0126, Cydney Woodson, LAC-21772

Following discussion, Ms. Palacios moved, seconded by Ms. Henagan, to approve the consent agenda item 4(I). The motion passed unanimously.

*The Board took a break 10:24 a.m., reconvening its public meeting at 10:34 a.m.*

**5. Administrative Hearings**

Administrative Hearing Pursuant to A.R.S. §§ 32-3281 and 41-1092.07, the Board will conduct administrative hearings or consider related procedural issues in the following matter(s). During the administrative hearing, the Board may go into executive session to discuss confidential records pursuant to A.R.S. § 38-431.03(A)(2) or to obtain legal advice pursuant to A.R.S. § 38-431.03(A)(3).

N/A

**6. Formal Interviews**

N/A

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

A. 2023-0235, Dorothy Granberry, LAC-20539 (active restricted)

Mr. Carver summarized the Board’s investigation.

The complainant was properly noticed, but failed to appear.

The professional appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Bailey moved, seconded by Ms. Palacios, to find the following violations:

- A.R.S. § 32-3251(16)(k), engaging in any conduct or practice that is contrary to recognized standards of ethics in the behavioral health profession or that constitutes a danger to the health, welfare or safety of a client as it relates to the following section of the ACA Code of Ethics:
  - A.8. Multiple Clients
- A.R.S. § 32-3251(16)(p), failing to conform to minimum practice standards as developed by the board as it relates to:
  - A.A.C. R4-6-1101. Consent for Treatment
  - A.A.C. R4-6-1102. Treatment Plan
  - A.A.C. R4-6-1104. Financial and Billing Records

The motion passed unanimously. Ms. Coonrod recused.

Following further discussion, Ms. Bailey moved, seconded by Ms. Palacios, to consolidate complaint numbers 2023-0093, and 2023-0197. The motion passed unanimously. Ms. Coonrod recused.

Following further review, Ms. Bailey moved, seconded by Ms. Knape, to offer the professional a consent agreement for the voluntary surrender of the professional’s license. The motion passed unanimously. Ms. Coonrod recused.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leannette Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X		X	X	X	X		X
NAY									
Absent			Recused					X	

Following further review and discussion by members, Ms. Knape moved, seconded by Ms. Bailey, to open a complaint on the professional’s clinical supervisor. The motion passed unanimously. Ms. Coonrod recused.

B. 2024-0180, Tamara Overhage, LAC-22327

Ms. Zavala summarized the Board’s investigation.

The professional was properly noticed, but failed to appear.

Following discussion by members, Ms. Bailey moved, seconded by Ms. Henagan, to accept the proposed signed consent agreement for the voluntary surrender of the professional’s license. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

Following further discussion, Mr. Charles moved, seconded by Mr. Trotter, to refer the case to law enforcement pursuant to A.R.S. § 13-1418(B) and A.R.S. § 32-3281(M). The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

*C. Charity Northan James LPC-18935 (Revoked)*

Ms. Zavala summarized the background information.

Ms. Northan James appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Coonrod moved, seconded by Ms. Knape, to issue a cease and desist order. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

Following further discussion, Ms. Coonrod moved, seconded by Ms. Bailey, to refer the case to the Arizona Attorney General’s Office pursuant to A.R.S. § 32-3227(F). The motion passed unanimously.

*D. 2023-0204, Snaha Patel, LPC-17806 (Interim suspended)*

Ms. Zavala summarized the Board’s investigation.

The professional and her attorney, Andrew Breavington, appeared and addressed the Board.

Mr. Trotter moved, seconded by Ms. Bailey, to go into Executive Session pursuant to A.R.S. § 38-431.03(A)(2) to review confidential records exempt from public inspection. The motion passed unanimously and the Board went into executive session at 9:23 am, reconvening its public meeting at 9:32 am.

Following review and discussion by members, Ms. Palacios moved, seconded by Ms. Bailey, to 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

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

The motion passed unanimously.

Following further discussion, Ms. Palacios moved, seconded by Ms. Bailey, to consolidate complaint numbers 2022-0100, 2022-0109, 2022-0129, and 2023-0204. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

Following further review, Ms. Palacios moved, seconded by Mr. Trotter, to offer a modified consent agreement that has the following additional stipulations:

- The licensee shall be placed on probation for 24 months
- Stayed suspension
- The professional shall receive therapy twice monthly for 12 months with a pre-approved behavioral health professional. The frequency for the remaining time will be at the recommendation of the therapist, but not less than once monthly
- Therapy shall focus on issues identified in the Board’s report
- Existing clinical supervision shall focus on self-care and client workload
- A practice restriction shall be in place for no participation in private practice

and to approve the professional’s request for release from the interim consent agreement upon acceptance of a consent agreement, and if not signed the professional’s license will remain suspended. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

*E. 2023-0196, Jody Tatro, LPC-21310*

Ms. Zavala summarized the Board’s investigation.

The complainant appeared telephonically and addressed the Board.

The professional appeared telephonically and her attorney, Kevin Crowley, appeared in-person and addressed the Board.

Following review and discussion by members, Ms. Knape moved, seconded by Mr. Trotter, to dismiss the complaint with a letter of concern addressing the importance of accurate documentation and immediacy of mandatory reporting. The motion passed unanimously.

*F. 2024-0089, Rachel Tegtmeyer, LAC-20551*

Mr. Carver summarized the Board’s investigation.

The complainant was properly noticed, but failed to appear.

The professional appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Bailey moved, seconded by Ms. Knape, to find the following violations:

- A.R.S. § 32-3251(16)(c)(ii), making any oral or written misrepresentation of a fact in any statements provided during an investigation or disciplinary proceeding by the board
- A.R.S. § 32-3251(16)(p), failing to conform to minimum practice standards as developed by the board as it relates to:
  - A.A.C. R4-6-1101. Consent for Treatment
  - A.A.C. R4-6-1102. Treatment Plan

- A.A.C. R4-6-1105. Confidentiality
- A.A.C. R4-6-1106. Telepractice
- A.R.S. § 32-3251(16)(x), exploiting a client, former client or supervisee. For the purposes of this subdivision, "exploiting" means taking advantage of a professional relationship with a client, former client or supervisee for the benefit or profit of the licensee
- A.R.S. § 32-3251(16)(y), engaging in a dual relationship with a client that could impair the licensee's objectivity or professional judgment or create a risk of harm to the client. For the purposes of this subdivision, "dual relationship" means a licensee simultaneously engages in both a professional and nonprofessional relationship with a client that is avoidable and not incidental

The motion passed unanimously. Ms. Palacios recused.

Following further review, Ms. Bailey moved, seconded by Mr. Trotter, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 24 months
- The professional shall complete a pre-approved 3 semester credit hour graduate level course in behavioral health ethics
- The licensee shall complete pre-approved continuing education in:
  - 18 clock hours in behavioral health ethics to include boundaries, dual relationships, and exploitation of clients
  - 6 clock hours in Arizona documentation
  - 3 clock hours in behavioral health services in rural settings
  - Arizona Statutes/Regulation Tutorial
  - 5 clock hours in attendance of a Board meeting in the first year
  - 5 clock hours in attendance of a Board meeting in the second year
- The professional shall receive clinical supervision weekly from a pre-approved independently licensed behavioral health professional. The frequency for the remaining time will be twice monthly
- Clinical supervision shall focus on boundaries, Board statutes and rules, Arizona documentation, dual relationships, exploitation of clients, communication with clients outside of the behavioral health setting, effective therapy models, and decision-making model
- The clinical supervision in the first year shall not count towards independent licensure. The clinical supervision in the second may be considered towards independent licensure
- A practice restriction shall be in place for no participation in supervised private practice or private practice

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. Ms. Palacios recused.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X			X
NAY									
Absent							Recused	X	

G. 2024-0163 DeAnna Wahlheim LMFT-15692  
 Ms. Zavala summarized the Board's investigation.

The complainant was properly noticed, but failed to appear.

The professional was properly noticed, but failed to appear.

Following discussion by members, Mr. Trotter moved, seconded by Ms. Knape, to accept the signed proposed interim consent agreement. The motion passed unanimously. Ms. Palacios recused.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X			X
NAY									
Absent							Recused	X	

*H. Sydney Wallace, LAC-20532*

Ms. Zavala summarized the Board’s investigation.

The professional appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Palacios moved, seconded by Ms. Henagan, to open a complaint for further investigation. The motion passed unanimously.

Following further review, Ms. Palacios moved, seconded by Mr. Trotter, to order the professional to submit to a comprehensive substance abuse evaluation. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

*I. 2023-0197, Brierra Winfrey, LMSW-20899*

Ms. Zavala summarized 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, Ms. Henagan moved, seconded by Mr. Trotter, to find the following violations:

- A.R.S. § 32-3251(16)(s), terminating behavioral health services to a client without making an appropriate referral for continuation of care for the client if continuing behavioral health services are indicated
- A.R.S. § 32-3251(16)(k), engaging in any conduct or practice that is contrary to recognized standards of ethics in the behavioral health profession or that constitutes a danger to the health, welfare or safety of a client as it relates to the following section of the NASW Code of Ethics:
  - 4.04 Dishonesty, Fraud, and Deception
- A.R.S. § 32-3251(16)(ii), violating any federal or state law, rule or regulation applicable to the practice of behavioral health, as it relates to
  - A.A.C. R4-6-205. Change of Contact Information

The motion passed unanimously.

Following further review, Ms. Henagan moved, seconded by Ms. Palacios, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 24 months
- The professional shall complete a pre-approved 3 semester credit hour graduate level course in behavioral health ethics
- The licensee shall complete pre-approved continuing education in:
  - 3 clock hours in Arizona documentation
  - 3 clock hours in fraud and abuse
  - 3 clock hours in professional conduct
  - 3 clock hours in continuity of care
  - 3 clock hours in trauma of abandonment

- 5 clock hours in attendance of a Board meetings
- The professional shall receive therapy from an independently licensed behavioral health professional. The frequency for the first year shall be at the recommendation of the therapist, but no less than monthly. The frequency for the remaining time will be at the recommendation of the therapist with early release available
- Therapy shall focus on assessment, self-care, past issues, burnout, and maternal mental health and trauma
- The professional shall receive clinical supervision twice monthly from a pre-approved independently licensed behavioral health professional
- Clinical supervision shall focus on fraud and abuse, Board statutes and rules, preparation for life events, care for caseload, professional conduct, and continuity of care
- A practice restriction shall be in place for no participation in supervised private practice

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	Robert Charles	Mary Coonrod	Leanette Henagan	Polly Knape	Adalesa Meek	Diane Palacios	Mark Shen	Antwan Trotter
AYE	X	X	X	X	X	X	X		X
NAY									
Absent								X	

*The Board took a break 11:26 a.m., reconvening its public meeting at 12:00 p.m.*

**8. Assistant Attorney General’s Report: Mona Baskin, A.A.G.**

*N/A*

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

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

*Counseling*

Ms. Palacios moved, seconded by Ms. Henagan, to deny 1 application based on a failure to pass the required examination, 6 applications based on a failure to take the required examination, and 4 applications based on a failure to meet minimum requirements. The motion passed unanimously.

*Marriage and Family Therapy*

Ms. Bailey moved, seconded by Ms. Knape, to deny 1 application based on a failure to pass the required examination and 1 application based on a failure to meet minimum requirements. The motion passed unanimously.

*Social Work*

Ms. Henagan moved, seconded by Ms. Bailey, to deny 11 applications based on a failure to pass the required examination. The motion passed unanimously.

*Substance Abuse Counseling*

Ms. Henagan moved, seconded by Ms. Knape, to deny 1 application based on a failure to take the required examination. The motion passed unanimously.

*B. Review, consideration, and possible action regarding applications for educational programs*

*N/A*

**10. Report from Chair**

*A. Summary of current events*

No report.

*B. Discussion regarding Ms. Zavala's annual review*

Ms. Meek requested constructive feedback from members for Ms. Zavala’s annual performance review by April 1, 2024. Feedback to include areas for improvement, new goals, and any other items to note. The Personnel Subcommittee will reconvene, which includes Ms. Meek, Mr. Trotter, Mr. Charles, and Mr. Shen. The Subcommittee will discuss the feedback received in April and May. Ms. Zavala’s performance review will then be presented at the May Board meeting.



## **11. Report from the Treasurer**

### *A. Review, consideration, and possible action regarding December financial report*

Following review and discussion by members, Ms. Knape moved, seconded by Ms. Bailey, to accept the December financial report as presented. The motion passed unanimously.

### *B. Review, consideration, and possible action regarding January financial report*

Following review and discussion by members, Ms. Knape moved, seconded by Ms. Bailey, to accept the December financial report as presented. The motion passed unanimously.

## **12. Report from the Executive Director and/or staff**

### *A. Update on 2024 pending Legislation*

Ms. Zavala provided an update on pending Legislation.

### *B. Update on Boardal implementation*

Ms. Zavala provided an update on the Boardal implementation and the vendor issues.

### *C. Update on Board members and appointments*

Ms. Zavala provided an update on vacancies.

### *D. Update regarding the 2024 Sunset Audit by the Arizona Auditor General's Office*

Ms. Zavala provided an update on the 2024 Sunset Audit by the Arizona Auditor General's Office.

### *E. Discussion regarding Board members and staff's attendance at the American Association of State Counseling Boards*

Ms. Meek, Ms. Knape, Ms. Yabu, and Ms. Zavala shared the American Association of State Counseling Boards Conference to be beneficial, along with their specific experiences.

### *F. Update on educational tools*

Ms. Zavala shared that the Board continues to create educational tools for the public.

### *G. Discussion regarding staff's 2023 accomplishments*

Ms. Zavala gave a presentation regarding the Board's 2023 accomplishments and goals for 2024.

### *H. Update regarding the Board's 2025 budget request*

Ms. Zavala provided an update on the Board's 2025 budget request.

### *I. Review, consideration and possible action regarding the preliminary report from the Ombudsman's Office and Board draft response*

Mr. Trotter moved, seconded by Ms. Henagan, to go into Executive Session pursuant to A.R.S. § 38-431.03(A)(3) to obtain legal advice. The motion passed unanimously and the Board went into executive session at 2:22 pm, reconvening its public meeting at 2:40 pm.

The Board members stated that they believe the current practice is in compliance with the law as also noted by the Arizona Attorney General's Office and Arizona Governor's Office. Following review and discussion by members, Mr. Trotter moved, seconded by Ms. Palacios, to direct staff to respond that the Board will comply with the Ombudsman's Office recommendation. The motion passed unanimously.

### *J. Review, consideration and possible action regarding petition pursuant to ARS 41-1003 to review 2003 substantive policy statement regarding practice authority for school counselors*

Following review and discussion by members, Mr. Trotter moved, seconded by Ms. Knape, to repeal the 2003 substantive policy statement regarding practice authority for school counselors. The motion passed unanimously.

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

N/A

## **14. Future agenda items**

- Educating School Counselors

**15. Call for public comment**

Alyssa Bateman, student, appeared and thank Ms. Zavala for presenting at her class and informing her of the option to attend a meeting, as she found it beneficial and educational.

**16. Establishment of future meeting date(s)**

*The next regular meeting is scheduled for Friday, March 8, 2024, at 9:00 a.m., at 1740 W. Adams St., Board Room C.*

**17. Adjournment**

Mr. Trotter moved, seconded by Ms. Palacios, to adjourn. The motion passed and the meeting was adjourned at 2:46 p.m.

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Polly Knape  
Secretary/Treasurer

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Date