

**MINUTES OF PUBLIC MEETING
FOR THE CORRECTIONS OFFICER RETIREMENT PLAN LOCAL BOARD
FOR THE JUDICIARY**

A Public Meeting of the Corrections Officer Retirement Plan Local Board for the Judiciary was convened Tuesday, November 4, 2025, at 10:00 a.m., via Zoom, Arizona State Courts Building, 1501 West Washington Street, Phoenix, Arizona.

Board Members Present by Conference/Video Call: Kevin Kluge (Chair); Jason Hathcock; Jennifer Fish; Brandon Shimizu; Scott Mabery

Board Members Absent: None

Also Present by Conference/Video Call: Kayla Adkins, Board Secretary; Leticia Chavez, AOC HR Supervisor

Call to Order:

Approval of Minutes:

October 7, 2025 – Public Meeting Minutes

MOTION: Scott Mabery moved to approve the public meeting minutes of the October 7, 2025, meeting. The motion was seconded by Jennifer Fish and passed unanimously. The minutes stand approved. **CORP 2025-43**

Update on Disability Case #25-01 – Maria Land

During the October 7, 2025, CORP Local Board meeting, the Board Secretary informed the Board that the following documentation requested from Maria Land during the September 2, 2025, meeting had been received.

- Maricopa County Incident Report pertaining to the PTSD claim
- EEOC Mediation agreement

Both documents were provided to the Board for review.

Discussion:

The Chair asked the Board if there were any comments or questions regarding the updated information. The Chair further stated that he believed the mediation agreement had no bearing on the disability request as the mediation was completed prior to Ms. Land's separation and refund of contributions. As a result, the Board would base the claim on Ms. Land's most recent re-hire date. Mr. Hathcock agreed and confirmed that while the Board had received the incident report

related to the PTSD claim, the remaining document needed from Ms. Land was the revised application indicating her updated hire date. The Chair emphasized the importance of the revised application aligning with the date of the incident.

Mr. Hathcock asked if Ms. Land's psych records had been given to the IME doctor for review to complete the second independent medical exam, to which the Chair confirmed. The Board Secretary added that the records were sent a few weeks prior. Mr. Hathcock also inquired whether Ms. Land had been contacted regarding the remaining documents requested by the Board, and also requested that Board staff inform Ms. Land of the progress regarding the independent medical exam. The Board Secretary advised that to date, additional contact had not been made to Ms. Land, but that staff would follow up with the applicant via email.

The Chair stated that if the requested information is received in time, the Board can review Case #25-01 during the December 2, 2025, CORP meeting.

Update on Disability Case #25-02 – Bernard Kuma

During the October 7, 2025, Local CORP Board meeting, the Board reviewed Ordinary Disability Case #25-02 for Bernard Kuma, with Board Member Scott Mabery motioning for an expedited IME. The following updates were presented to the Board:

- MCN had identified an oncologist to complete a review of Mr. Kuma's medical records.

Discussion:

The Chair asked if the applicant had received any updates on the application and inquired whether Mr. Kuma was still hospitalized. The Board Secretary replied that the member and his wife had been informed of the status of the application and that Mr. Kuma was no longer hospitalized.

Ms. Fish asked the Board Secretary if the urgency had been articulated to the IME doctor. The Board Secretary confirmed that the urgency had been conveyed to MCN but could not confirm if that had been relayed to the doctor, as Board staff have no direct contact with the provider.

The Chair asked the Board Secretary if the applicant was in hospice care, and the Board Secretary confirmed that no information had been received to indicate Mr. Kuma was in hospice. The Chair then stated that when the results of the IME were received, the Board could call a special meeting to review the information, also noting that case #25-01 could be included. The Chair instructed the Board Secretary to contact him to work on drafting a special meeting announcement for the Board.

Request for Retiree Return to Work – Bartolo Careaga

The Board received a Notice of Retiree Return to Work from the Maricopa County Judicial Branch for Bartolo Careaga, indicating that Mr. Careaga retired from the Maricopa County Adult Probation Department on January 5, 2024, with an effective CORP retirement date of February 1, 2024. He has since accepted an employment offer with the Maricopa County Judicial Branch and

returned to work on October 13, 2025, in a non-CORP-designated position as a Probation Dispatcher.

Copies of A.R.S. § 38-884.N-O. and Mr. Careaga’s current position description were provided to the Board.

Finding: Mr. Careaga appeared eligible to continue receiving a CORP pension because he returned to work in a non-CORP-designated position after retirement.

MOTION: Jason Hathcock moved that the Board received a Notice of Retiree Return to Work for Bartolo Careaga and found that (1) Mr. Careaga was eligible to continue receiving a CORP pension; (2) Mr. Careaga’s employer, Maricopa County Judicial Branch, was not responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a non-CORP-designated position. The motion was seconded by Brandon Shimizu and passed unanimously. **CORP 2025-44**

Request for Retiree Return to Work – Ted Milham

The Board received a Notice of Retiree Return to Work from the Maricopa County Judicial Branch for Ted Milham, indicating that Mr. Milham retired from the Maricopa County Judicial Branch on May 30, 2025, with an effective CORP retirement date of June 1, 2025. He has since accepted an employment offer with the Maricopa County Judicial Branch and returned to work on October 13, 2025, in a non-CORP-designated position as a Background Investigator.

Copies of A.R.S. § 38-884.N-O. and Mr. Milham’s current position description were provided to the Board.

Finding: Mr. Milham appeared eligible to continue receiving a CORP pension because he returned to work in a non-CORP-designated position after retirement.

MOTION: Jennifer Fish moved that the Board received a Notice of Retiree Return to Work for Ted Milham and found that (1) Mr. Milham was eligible to continue receiving a CORP pension; (2) Mr. Milham’s employer, Maricopa County Judicial Branch, was not responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a non-CORP-designated position. The motion was seconded by Jason Hathcock and passed unanimously. **CORP 2025-45**

Acknowledgment of CORP Physical Exam Final Letter:

Name	County	Letter Issue Date
Mariah Gipson	Greenlee	9/11/2025
Yesica Sanchez	Maricopa	9/9/2025
Jeffry Knudsen	Maricopa	9/9/2025
Cierra Hocter	Maricopa	9/9/2025
Rocio Hernandez	Maricopa	9/9/2025

Monique Medina	Maricopa	9/9/2024
Aaron Combs	Navajo	9/4/2025

The Chair noted for the record that the CORP physical examination reports for Mariah Gipson, Yesica Sanchez, Jeffrey Knudsen, Cierra Hctor, Rocio Hernandez, Monique Medina, and Aaron Combs were not received within 60 days of receiving their membership application and that a final letter requesting the examination report was sent via certified mail.

Discussion:

The Chair stated that the Board may need to update the Board’s Rules and Procedures to clarify that members who don’t submit a physical exam within their first 90 days waive the right to apply for disability retirement. The Chair asked the Board Secretary if that verbiage was a part of the current rules and regulations. The Board Secretary stated that further clarification was needed when a member submits a physical exam after the first 90 days.

Mr. Hathcock mentioned that the Board must follow the statute and inquired if there were clear instructions on how to handle the information. The Chair stated that the guidance from the statutes was unclear, and that the Board and Board Staff needed to review the current information and document the correct rules and procedures to ensure consistency when processing the information.

Mr. Hathcock asked if the clinics were losing the paperwork. The Board Secretary stated that this was not always the case and that there were instances where incorrect information was sent or where CORP was not on a list of authorized receivers and the exam was sent elsewhere. The Board Secretary also mentioned that there had been cases where the wrong exam paperwork was sent, and the member would have to retrieve the correct documents from the clinic.

The Board Secretary stated that Board Staff had been encouraging the county HR departments to provide the required forms to the new members to take to the physician.

Mr. Hathcock asked if the Administrative Office of the Courts contracts with the clinics, to which the Board Chair stated that the counties handle the contracts. The Board Secretary advised the Board that the language the Board Staff typically uses with the counties is that the CORP local board does not require members to go to any specific provider; however, the counties are responsible for payment for the physical exams. Therefore, it's up to the counties to determine if there are any restrictions on the providers that the members go to.

Mr. Hathcock asked if the listed members were examples of those who had completed the physical exam but couldn’t obtain a copy. The Board Secretary stated that she did not believe so but would have to review the communication Board Staff has had with the members.

Ms. Fish asked the Board Secretary for clarification regarding the notifications sent to members from whom the Board has not received a pre-hire physical exam. The Board Secretary explained that the Board Staff sends notifications at the 30-day mark, emailing the employer to inform them that a member has not completed an exam. At 60 days, a certified letter is mailed directly to the

member, notifying them that their physical exam has not been received and that this waives their rights to a disability claim.

The Board Secretary also noted that all providers manage physical exams differently, even within the same agency, and that several steps are involved in obtaining the correct documentation.

Mr. Hathcock asked if a physical exam is received after the 90 days, is the Board notified of receipt. The Board Secretary stated that the Board Staff does not include that information on the meeting agenda.

The Chair instructed Board Staff to compile a list of members who have waived the right to a disability claim for the Board to review.

Mr. Mabery asked the Board Secretary if there was a trend in counties for missing physical exams, to which the Board Secretary replied that she would have to look at the data and provide that information at the next meeting.

The Chair stated that further discussion of this would be placed on the next meeting agenda so that the Board could be prepared to address any questions or concerns.

Approval of Membership:

The Board voted on the approval of the following requests for membership:

Name	County	Effective Enrollment Date	Tier
Bianei Jaramillo	Coconino	10/5/2025	3
Michael Pate	Graham	9/28/2025	3
Megan Bejarano	Greenlee	10/5/2025	3
Mariah Gipson	Greenlee	8/31/2025	3
Alexis Mason	Maricopa	9/21/2025	3
Darian Jackson	Maricopa	9/21/2025	3
Krystle-Lyn Garcia	Maricopa	9/21/2025	3
Madelynn Dierbeck	Maricopa	9/21/2025	3
Sydnee Martinez	Maricopa	9/21/2025	3
Stacy Rutlin	Maricopa	9/1/2025	3
Jyden Miles	Maricopa	10/5/2025	3
Maribel Ayala Lopez	Maricopa	10/5/2025	3
Miguel Posada Harris	Maricopa	10/6/2025	3
Sharay Crofton	Maricopa	10/5/2025	3
Susana Chairez-Rodriguez	Maricopa	10/5/2025	3
Wander Morel	Maricopa	10/5/2025	3
Yesica Sanchez	Maricopa	6/29/2025	3
Jeffry Knudsen	Maricopa	6/29/2025	3

Cierra Hctor	Maricopa	5/19/2025	3
Rocio Hernandez	Maricopa	6/29/2025	3
Monique Medina	Maricopa	3/31/2025	3
Bailey Lawrence	Maricopa	9/7/2025	3
Brandi Peterson	Maricopa	10/12/2025	3
Ryan Heusser	Mohave	10/12/2025	3
Aaron Combs	Navajo	10/12/2025	3
Marqisha Dunn	Pima	8/3/2025	3
Karla Valdez-Avila	Pima	9/2/2025	3
Jesse Phillips	Pima	9/28/2025	3
Andrew Green	Pima	6/30/2025	3
Aria Jones	Pima	10/12/2025	3
Elizabeth Belleau	Pima	10/12/2025	3
Vivian Guerrero	Pima	6/16/2025	2
Cleophus Glass	Pinal	6/23/2025	3
Elide Gutierrez Salinas	Pinal	9/21/2025	3
Gabrielle Dawson	Pinal	9/21/2025	3
Ryan Kizzar	Pinal	7/7/2025	2
DJ Kalu	Pinal	9/26/2025	3
Manuel Caballero III	Santa Cruz	9/21/2025	3
Yuliana Tanori	Santa Cruz	9/21/2025	3
Nathaniel Patterson	Yavapai	10/12/2025	3
Tabitha Foster	Yavapai	10/12/2025	3
Tanya Klein	Yavapai	10/12/2025	3
Alexi Andrews	Yuma	10/5/2025	3

MOTION: Jennifer Fish moved to approve the 43 applicants listed on the agenda for this meeting for membership in CORP pursuant to A.R.S. § 38-893.D. and to note for the record that the physical examinations for Megan Bejarano, Alexis Mason, Stacy Rutlin, Maribel Ayala-Lopez, Susana Chairez-Rodriguez, Wander Morel, Bailey Lawrence, Andrew Green, Cleophus Glass, Elide Gutierrez-Salinas, Gabrielle Dawson, Ryan Kizzar, Tabitha Foster, and Tanya Klein identified a physical or mental condition or injury that existed or occurred before their dates of membership in the plan. The motion was seconded by Scott Mabery and passed unanimously. **CORP 2025-46**

2025 CORP Membership Audit Results

During the month of July, Local Board staff initiated an audit of the Board's membership records against an active membership list provided by PSPRS. The 132 discrepancies identified and corrected during the 2025 audit are outlined below.

The Board Chair asked if the items listed had been corrected. The Board Secretary informed the Board that the information has been corrected in the CORP Membership Database, but that staff

had requested the CORP New Hire Notification form for the active members and are waiting to receive them.

Cochise

- 1 Missing member termination date
- **1 Discrepancies total**

Coconino

- 1 Active member from the Board's database
- 9 Missing member termination dates
- **10 Discrepancy total**

Graham

- 12 Missing member termination dates
- **12 Discrepancies total**

Gila

- 10 Missing member termination dates
- **10 Discrepancies**

Greenlee

- 1 Missing member termination date
- **1 Discrepancies total**

La Paz

- 2 Active members from the Board's database
- **2 Discrepancy total**

Maricopa

- 1 Active member from the Board's database
- 21 Missing member termination dates
- 3 Members had incorrect SSNs entered in the Board's database
- **25 Discrepancies total**

Mohave

- 6 Missing member termination dates
- **6 Discrepancy total**

Navajo

- 11 Missing member termination dates
- **11 Discrepancies total**

Pima

- 23 Missing member termination dates
- **23 Discrepancies total**

Pinal

- 11 Missing member termination dates
- **11 Discrepancies total**

Santa Cruz

- 4 Missing member termination dates
- **4 Discrepancy total**

Yavapai

- 1 Active member from the Board’s database
- 13 Missing member termination dates
- **14 Discrepancies total**

Yuma

- 2 Missing member termination dates
- **2 Discrepancies total**

Discussion:

The Chair asked if a procedural change was needed to address the missing termination notifications. The Board Secretary stated that the annual audit corrects these errors, but that Board Staff has also initiated a bi-annual training program to address the issues as well.

Mr. Hathcock emphasized that the five missing members were the primary concern.

The Chair asked who notifies the Board of membership changes, and the Board Secretary noted that the human resources office of the county employing the member is responsible.

Approval of 2026 Meeting Dates

Meeting dates for 2026 are proposed for the Board’s approval. All meetings are scheduled to begin at 10:00 a.m. on Tuesdays.

January 6 th
February 3 rd
March 3 rd
April 7 th
May 5 th
June 2 nd
July 7 th
August 4 th
September 1 st
October 6 th
November 3 rd

December 1st

The Chair stated that he would not be in attendance at the June 2, 2026, meeting, checking with the Board to ensure a quorum.

MOTION: Jason Hathcock moved to approve the proposed Board meeting dates for 2026.
The motion was seconded by Scott Mabery and passed unanimously. **CORP 2025-47**

Future Agenda Items:

- Discussion and review of the CORP Rules and Procedures to clarify the pre-hire physical exams and pre-existing condition parameters.
- Update/Review of Disability Case #25-01
- Update/Review of Disability Case #25-02

Call to the Public:

The meeting was adjourned at 10:37 a.m.

Transcribed November 13, 2025