

**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 on Tuesday, October 7, 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: Jason Hathcock (Acting Chair); Jennifer Fish; Brandon Shimizu; Scott Mabery

Board Members Absent: Kevin Kluge, Chair

Also Present by Conference/Video Call: Kayla Adkins, Board Secretary; Alexi Papalossi, Recorder; Nick Cornelius, Board Attorney; Yvonne Wong, AOC HR Officer; Leticia Chavez, AOC HR Supervisor

Call to Order:

Approval of Minutes:

September 2, 2025 – Public Meeting Minutes
September 2, 2025 – Executive Session Meeting Minutes

Discussion: The Acting Chair confirmed with the Board Secretary that the provided meeting minutes included the corrections.

MOTION: Jennifer Fish moved to approve the public and executive session meeting minutes of the September 2, 2025, meeting. The motion was seconded by Brandon Shimizu and passed 3-0-1. Scott Mabery abstained from voting due to his absence at the September 2, 2025, meeting. The minutes stand approved with three votes in favor and one abstention. **CORP 2025-40**

2025 CORP Membership Audit Update

The Board Secretary informed the Board that Board Staff has begun an audit of the CORP Local Board's membership records against an active membership list provided by PSPRS.

- Staff received a complete list of active members from PSPRS.
- Staff completed a comprehensive list broken down by county.

Any discrepancies found will be reported at the November 4, 2025, meeting.

Discussion: The Acting Chair asked the Board Secretary if Board Staff had an estimated number of discrepancies. The Board Secretary stated that to date only the active members had been

audited with very few discrepancies, and that the Board Staff were currently in the process of auditing the terminated/retired members.

Review of Disability Case #25-02 – Bernard Kuma

The Board received Application #25-02 for Ordinary Disability benefits from Bernard Kuma on September 17, 2025.

- The applicant is a Maricopa County Juvenile Probation Officer with 18.081 years of service.
- The applicant identified the disabling conditions as cancer, end-stage kidney disease, and stroke.
- Mr. Kuma was notified via certified letter and email that the Board would consider his application at this meeting and of the applicant's right to attend.
- The applicant initialed the Waiver of Confidentiality provision to allow discussion of the medical condition in an open public meeting.
- The applicant provided medical reports of findings and treatment with the application. The application and medical reports are provided for the Board. The criteria for Ordinary Disability benefits per A.R.S. §38-886.01 are:
 - "Ordinary Disability" means a physical condition that the local board determines will totally and permanently prevent an employee from performing a reasonable range of duties within the employee's department or a mental condition that the local board determines will totally and permanently prevent an employee from engaging in any substantial gainful activity.

A copy of A.R.S. §38-886.01 governing Local Board consideration of applications for ordinary disability was included for reference purposes.

Pre-Existing Conditions:

The applicant's physical exam dated August 10, 2007, was provided. The exam reports identified the following pre-existing conditions: diabetes and high blood pressure.

Discussion

The Acting Chair asked if Mr. Kuma was present, to which the Board Secretary responded, no.

The Acting Chair inquired who the Board Secretary was corresponding with regarding this application. The Board Secretary advised that the applicant's spouse had been communicating on his behalf and clarified that the applicant signed the application and that the signature appeared to be legitimate.

The Acting Chair informed the Board that the Board Attorney was present and had the right to enter executive session for legal advice. The Board declined. The Acting Chair opened the floor to discussion.

The Acting Chair continued by confirming that the Board had received a letter of termination and that the application the Board received was for Ordinary Disability, meaning that the condition did not need to be job-related. The Acting Chair noted that the application listed three disabling conditions; cancer, late-stage kidney disease, and stroke and questioned if each condition would require a different independent medical examiner. Shimizu stated that, according to the medical records, Mr. Kuma was terminal with end-stage kidney disease. Mr. Shimizu added that with that prognosis, the Board could focus on that one disabling condition. Ms. Fish agreed with Mr. Shimizu, stating that any one of the three disabling conditions listed could potentially qualify for Ordinary Disability on their own and questioned the members ability to attend an IME.

The Acting Chair asked if the IME could be conducted via video conference or if an in-person evaluation was required. The Board Secretary stated that Mr. Kuma was still hospitalized and would inform the Medical Consultants Network (MCN) that Mr. Kuma would not be able to attend an in -person appointment.

The Acting Chair stated that, given the member's current condition, the Board needed to act quickly to ensure all information is received and reviewed before Mr. Kuma passes away. The Acting Chair asked the Board attorney whether he had experienced a case where the members passed away during the evaluation process. Mr. Cornelius responded that he had seen instances in which a member passed away during the administrative process at which point the survivor benefits kicked in. Mr. Cornelius added that disability benefits are a periodic payment to compensate the member for lost income and believed. Kuma qualifies. The Acting Chair reminded the Board that they cannot base their determination solely on Mr. Kuma's records and must send the member for an IME, to which Mr. Cornelius agreed.

The Acting Chair asked the Board Secretary for guidance on how MCN handles IME requests. The Board Secretary explained that the intake form asks explicitly which type of provider is being requested. The Board Secretary continued that she would contact MCN and explain the situation and see what options were available.

Mr. Mabery asked if the Board must go through MCN specifically or if the Board could find a provider already at Mr. Kuma's hospital to complete the IME. Mr. Cornelius suggested that the Board Secretary contact Dignity Health to see if they have someone staffed to complete the necessary forms. The Board Secretary stated that, to her knowledge, the member was still hospitalized, and she would reach out to the member's spouse for an update on his condition.

Mr. Cornelius then stated that he had a concern about locating a person with permission to be in the facility that the member is currently in, who was not already a part of Mr. Kuma's care team. As the IME must be completed by an independent party not involved in Mr. Kuma's care. Mr. Cornelius recommended that The Board Secretary reach out to the facility and to MCN to explore the available options. The Acting Chair reaffirmed that The Board Secretary should convey the urgency of this case and request a review of the medical records, with the evaluation to be scheduled as soon as possible. Mr. Cornelius advised the Board that they can hold an additional meeting before the November 4, 2025, meeting if the information is received quickly.

MOTION: Scott Mabery moved to refer Applicant #25-02, Bernard Kuma, for an expedited Independent Medical Evaluation for Ordinary Disability, and to reserve the ability to reconvene sooner than the November 4, 2025, meeting to review the case if the necessary information is received. The motion was seconded by Jennifer Fish and passed unanimously.
CORP 2025-41

Update on Disability Case #25-01 – Maria Land

During the September 2, 2025, Local CORP Board meeting, the Board requested that the following documents be received to properly review Disability Case #25-01.

- Psychiatric medical records for IME reevaluation
- A copy of the Maricopa Sheriff's Office Incident Report regarding the PTSD claim
 - Any additional documentation pertaining to the incident
- A copy of the settlement from the EEOC claim
 - Any additional information pertaining to the settlement
- Completed revised Accidental Disability Application
 - Update the date of the PTSD incident
- Any additional documentation on the PTSD claim

The following documents have been received:

- Psychiatric medical records for IME reevaluation

The Following documents have not been received.

- A copy of the Maricopa Sheriff's Office Incident Report regarding the PTSD claim
 - Any additional documentation pertaining to the incident
- A copy of the settlement from the EEOC claim
 - Any additional information pertaining to the settlement
- Completed revised Accidental Disability Application
 - Update the date of the PTSD incident
- Any additional documentation on the PTSD claim

The Board Secretary requested these documents from Ms. Land via email on September 4, 2025, and confirmed that while a few of the requested documents had since been received, they were received after publication and distribution of the October meeting materials and therefore could not be included for review. The Board Secretary explained that a Copy of the Maricopa Sheriff's Office's Incident report, and a copy of the mediation agreement had been received. Mr. Cornelius confirmed that the mediation agreement is the same as the settlement claim.

The Board Secretary advised the Board that the reevaluation of Ms. Land's IME can begin, as the Maricopa County Incident Report had been received. The Acting Chair asked the Board Secretary if the received documents would be sent to the psychiatrist who previously completed the evaluation. The Board Secretary clarified that she would request the same provider through MCN to ensure proper invoicing. The Acting Chair then asked if the applicant would have to be seen

again or if it would be a records review. The Board Secretary said she would request a records review, but that it would be up to the provider to determine if another appointment was necessary

Ms. Fish asked whether Board staff were waiting to receive the revised disability application, to which the Board Secretary responded, yes. The Acting Chair directed Board staff to send an email to Ms. Land, confirming the information received and requesting what remains to be provided.

Acknowledgment of CORP Physical Exam Final Letter

Name	County	Letter Issue Date
Pearl Valencia	Pima	8/5/2025

The Acting Chair noted, for the record, that the CORP physical examination report for Pearl Valencia was not received within 60 days of receiving their membership application and that a final letter requesting the examination report was sent via certified mail.

Approval of Membership:

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

Name	County	Effective Enrollment Date	Tier
Aspen Padgett	Cochise	9/7/2025	3
Elizabeth Holloway	Graham	8/31/2025	3
Alea Bahr	Maricopa	6/29/2025	3
Ruben Joseph	Maricopa	3/31/2025	3
Steven Jackson	Maricopa	4/25/2025	3
Joseph Majak	Maricopa	7/21/2025	3
Latisha Chastain	Maricopa	5/12/2025	3
Mercedes Tang	Maricopa	8/31/2025	3
Martina Dabrowska-Saltzman	Maricopa	4/14/2025	3
Grace Johnson	Maricopa	9/14/2025	3
Samantha Witter	Maricopa	9/14/2025	3
Sherrita Dilsworth	Maricopa	9/14/2025	3
Timothy Steines	Maricopa	9/14/2025	3
Jeanette Rodriguez	Maricopa	8/18/2025	3
Paige Pettit	Maricopa	6/22/2025	3
Samantha Riepel	Navajo	8/31/2025	3
Hissaki Lee	Pima	8/31/2025	3
Jayden Porter	Pima	8/31/2025	3
Kyle Elliot	Pima	8/31/2025	3
Pearl Valencia	Pima	8/31/2025	3
Riley Hamm	Pima	9/14/2025	3
Henry Zacarias	Pima	9/7/2025	3

Richard Austin	Pinal	6/29/2025	3
Jacob Stein	Pinal	8/10/2025	3
Misty Olsen	Pinal	8/10/2025	3
Sammy Nunez	Pinal	8/10/2025	3
Shelly Bird	Pinal	9/6/2025	3
Azrael Garcia	Pinal	9/7/2025	3
Haylie Silvernale	Yavapai	8/25/2025	3
Caleb Munoz	Yavapai	9/14/2025	3
Cameron Metcalf	Yavapai	5/5/2025	3
Paitlyn Boustedt	Yavapai	8/31/205	3

Discussion

The Acting Chair requested an update on Paige Pettit’s pre-existing condition, and that Ruben Joseph’s plan selection be corrected from 3% to 5%. The Board Secretary confirmed the corrections.

MOTION: Jennifer Fish moved to approve the 32 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 Elizabeth Holloway, Joseph Majak, Latisha Chastain, Mercedes Tang, Samantha Witter, Richard Austin, Paige Pettit, and Paitlyn Boustedt 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 2025-42

Future Agenda Items:

- Request of a Retiree Return to Work for review
- Final report for the CY2025 CORP membership Audit
- Meeting Dates for CY2026 will be provided for the Board’s approval.

Discussion

Mr. Mabery requested that the Board schedule a meeting to review Disability Case #25-02 before the next scheduled meeting on November 4, 2025. The Board decided not to schedule a special hearing until the required information is received.

Call to the Public:

The meeting was adjourned at 10:35 a.m.

Transcribed October 8, 2025