



ACCOUNTING EXAMINING BOARD
Room N206, 4822 Madison Yards Way, 2nd Floor, Madison
Contact: Debra Sybell (608) 266-2112
March 4, 2020

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

- A. Adoption of Agenda (1-3)**
- B. Approval of Minutes of November 21, 2019 (4-5)**
- C. Approval of Minutes of January 31, 2020 (6-7)**
- D. Administrative Matters – Discussion and Consideration**
 - 1. Department, Staff and Board Updates
 - 2. Annual Policy Review **(8)**
 - 3. Election of Officers, Appointment of Liaisons, and Delegation of Authorities **(9-16)**
 - 4. 2020 Meeting Dates **(17)**
 - 5. Board Members – Term Expiration Dates
 - a. Gerald Denor – 7/1/2017
 - b. Michael Friedman – 7/1/2023
 - c. Robert Misey – 7/1/2021
 - d. Joan Phillips – 7/1/2023
 - e. John Reinemann – 7/1/2021
 - f. David Schlichting – 7/1/2022
 - g. Susan Strautman – 7/1/2020
- E. Credentialing Matters – Discussion and Consideration (18)**
 - 1. Certified Public Accountants Certified and Licensed Since Last Review Meeting **(19-20)**
 - 2. Firms Licensed Since Last Review Meeting **(21)**
- F. Administrative Rule Matters – Discussion and Consideration**
 - 1. Pending or Possible Rulemaking Projects
- G. Statutes and Rules – Peer Review and Definition of Institution – Discussion and Consideration**

H. Speaking Engagements, Travel, or Public Relation Requests, and Reports

1. Consideration of Attendance at NASBA 2020 Eastern Regional Meeting – June 8-11, 2020 – White Sulphur Springs, WV

I. Newsletter Planning and Consideration of Topics

J. Discussion and Consideration of Items Added After Preparation of Agenda:

1. Introductions, Announcements and Recognition
2. Administrative Matters
3. Election of Officers
4. Appointment of Liaisons and Alternates
5. Delegation of Authorities
6. Education and Examination Matters
7. Credentialing Matters
8. Practice Matters
9. Legislative and Policy Matters
10. Administrative Rule Matters
11. Liaison Reports
12. Board Liaison Training and Appointment of Mentors
13. Informational Items
14. Division of Legal Services and Compliance (DLSC) Matters
15. Presentations of Petitions for Summary Suspension
16. Petitions for Designation of Hearing Examiner
17. Presentation of Stipulations, Final Decisions and Orders
18. Presentation of Proposed Final Decisions and Orders
19. Presentation of Interim Orders
20. Petitions for Re-Hearing
21. Petitions for Assessments
22. Petitions to Vacate Orders
23. Requests for Disciplinary Proceeding Presentations
24. Motions
25. Petitions
26. Appearances from Requests Received or Renewed
27. Speaking Engagements, Travel, or Public Relation Requests, and Reports

K. Public Comments

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85(1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85(1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.).

L. Credentialing Matters

1. **Application Reviews**
 - a. Andrew DeCheck – Experience Review **(22)**

M. Deliberation on Division of Legal Services & Compliance (DLSC) Matters

1. **Stipulations and Final Decisions and Orders**
 - a. 16 ACC 025 – Gregory A. Anderson **(23-30)**
 - b. 17 ACC 001 – Beth Bant **(31-37)**

2. **Case Closings**
 - a. 17 ACC 009 – S.C.S.C. (38-42)

N. Deliberation of Items Added After Preparation of the Agenda

1. Education and Examination Matters
2. Credentialing Matters
3. DLSC Matters
4. Monitoring Matters
5. Professional Assistance Procedure (PAP) Matters
6. Petitions for Summary Suspensions
7. Petitions for Designation of Hearing Examiner
8. Proposed Stipulations, Final Decisions and Order
9. Proposed Interim Orders
10. Administrative Warnings
11. Review of Administrative Warnings
12. Proposed Final Decisions and Orders
13. Matters Relating to Costs/Orders Fixing Costs
14. Case Closings
15. Board Liaison Training
16. Petitions for Assessments and Evaluations
17. Petitions to Vacate Orders
18. Remedial Education Cases
19. Motions
20. Petitions for Re-Hearing
21. Appearances from Requests Received or Renewed

O. Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

P. Vote on Items Considered or Deliberated Upon in Closed Session, if Voting is Appropriate

Q. Open Session Items Noticed Above Not Completed in the Initial Open Session

ADJOURNMENT

NEXT DATE: JUNE 17, 2020

MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held at 4822 Madison Yards Way, Madison, Wisconsin, unless otherwise noted. In order to confirm a meeting or to request a complete copy of the board's agenda, please call the listed contact person. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of disciplinary hearings may be changed by the examiner for the convenience of the parties. Interpreters for the hearing impaired provided upon request by contacting the Affirmative Action Officer, 608-266-2112.

**ACCOUNTING EXAMINING BOARD
MEETING MINUTES
NOVEMBER 21, 2019**

PRESENT: Gerald Denor (*via Skype*), Michael Friedman, Joan Phillips, John Reinemann, and Susan Strautmann

EXCUSED: Robert Misey, David Schlichting

STAFF: Debra Sybell, Executive Director; Jon Derenne, Rule Coordinator; Megan Glaeser, Bureau Assistant; and other DSPS Staff

CALL TO ORDER

Gerald Denor, Chairperson, called the meeting to order at 9:02 a.m. A quorum was confirmed with five (5) board members present.

ADOPTION OF AGENDA

MOTION: Joan Phillips moved, seconded by Gerald Denor, to adopt the agenda as published. Motion carried unanimously.

APPROVAL OF MINUTES OF AUGUST 8, 2019

MOTION: Gerald Denor moved, seconded by Susan Strautmann, to approve the minutes of August 8, 2019 as published. Motion carried unanimously.

9:00 A.M. PUBLIC HEARING: SCOPE STATEMENT SS 094-19 – ACCY 2 RELATING TO EXAMINATIONS

Review and Respond to Public Hearing Comments

MOTION: John Reinemann moved, seconded by Joan Phillips, to approve the Scope Statement revising Accy 2, relating to examinations, for implementation. Motion carried unanimously.

MOTION: John Reinemann moved, seconded by Susan Strautmann, to authorize the Chairperson to approve the preliminary rule draft of Accy 2, relating to examinations, for posting of economic impact comments and submission to the Clearinghouse. Motion carried unanimously.

ADMINISTRATIVE RULE MATTERS

Carryforward of Ethics Continuing Professional Education (CPE) Credits under Clearinghouse Rule 19-049

MOTION: Gerald Denor moved, seconded by Michael Friedman, for DSPS staff to draft a guidance document as described in section 227.112, stats. clarifying that up to three ethics credits may be carried over into the next biennium for continuing education purposes and to authorize the Chairperson to approve the document for publication. Motion carried unanimously.

ADJOURNMENT

MOTION: Gerald Denor moved, seconded by Joan Phillips, to adjourn the meeting. Motion carried unanimously.

The meeting adjourned at 9:44 a.m.

**TELECONFERENCE/VIRTUAL
ACCOUNTING EXAMINING BOARD
MEETING MINUTES
JANUARY 31, 2020**

PRESENT: Gerald Denor, John Reinemann, David Schlichting, and Susan Strautmann

EXCUSED: Michael Friedman, Robert Misey, Joan Phillips

STAFF: Debra Sybell, Executive Director; Jameson Whitney, Legal Counsel; Dale Kleven, Rule Coordinator; Megan Glaeser, Bureau Assistant; and other DSPS Staff

CALL TO ORDER

Gerald Denor, Chairperson, called the meeting to order at 9:06 a.m. A quorum of four (4) members was confirmed.

ADOPTION OF AGENDA

MOTION: David Schlichting moved, seconded by John Reinemann, to adopt the agenda as published. Motion carried unanimously.

**9:00 A.M. PUBLIC HEARING: CLEARINGHOUSE RULE 19-160 – ACCY 2
RELATING TO EXAMINATIONS**

Review and Respond to Public Comments

MOTION: David Schlichting moved, seconded by John Reinemann, to authorize the Chair to approve the Legislative Report and Draft for Clearinghouse Rule CR 19-160, relating to examinations, for submission to the Governor's Office and Legislature. Motion carried unanimously.

MOTION: John Reinemann moved, seconded by David Schlichting, to authorize the Chair to approve the Adoption Order for Clearinghouse Rule CR 19-160, relating to examinations. Motion carried unanimously.

ADMINISTRATIVE MATTERS

Election of Officers (Vice Chairperson)

Vice Chairperson

NOMINATION: Gerald Denor nominated Michael Friedman for the Office of Vice Chairperson.

Debra Sybell, Executive Director, called for nominations three (3) times.

Michael Friedman was elected as Vice Chairperson by unanimous voice vote.

ADJOURNMENT

MOTION: Gerald Denor moved, seconded by David Schlichting, to adjourn the meeting. Motion carried unanimously.

The meeting adjourned at 9:14 a.m.

DRAFT

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Kimberly Wood, Program Assistant Supervisor-Adv.		2) Date When Request Submitted: 1/7/2020 <small>Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting</small>	
3) Name of Board, Committee, Council, Sections: All Boards			
4) Meeting Date:	5) Attachments: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6) How should the item be titled on the agenda page? Annual Policy Review	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required: N/A	
10) Describe the issue and action that should be addressed: Please be advised of the following Annual Policy Review items: <ol style="list-style-type: none"> 1. Attendance/Quorum – Thank you for your service and for your commitment to meeting attendance. If you cannot attend a meeting, we ask that you let us know ASAP as quorum is required for our Boards, Sections and Councils to meet pursuant to Open Meetings Law. DSPS Boards-Open Meetings Resources 2. Walking Quorum – Please refrain from discussing Board/Section/Council business with other members outside of legally noticed meetings so to avoid walking quorum issues pursuant to Open Meetings Law. DSPS Boards-Open Meetings Resources 3. Agenda Deadlines – Please let your executive Director know if you have items to be considered on an upcoming agenda no less than 8 business days prior to a meeting when possible. DSPS Boards-Reference Materials-Meeting Timeline 4. Travel Voucher and Per Diem Submissions – Please submit all Per Diem and Reimbursement Claims to DSPS within 30 days of date an expense is incurred. DSPS Boards-Travel and Reimbursement-Travel and Reimbursement Overview 5. Lodging Accommodations/Hotel Cancellation Policy – Lodging accommodations are provided to members who must leave home before 6:00 a.m. to attend a meeting. If you cannot attend a meeting it is the board member’s responsibility to cancel their reservation within the stated cancellation timeframe. If a meeting is changed to a teleconference or cancelled or rescheduled, DSPS staff will make lodging cancellations or modifications as needed. DSPS Boards-Travel and Reimbursement-Travel and Reimbursement Overview 6. Inclement Weather Policy – In the event of inclement weather the agency may change a meeting from an in-person meeting to a teleconference. 			
11) Authorization <div style="display: flex; justify-content: space-between; align-items: flex-end;"> <div style="width: 60%; border-bottom: 1px solid black; padding-bottom: 5px;"> <i>Kimberly Wood</i> </div> <div style="width: 35%; border-bottom: 1px solid black; padding-bottom: 5px;"> 1/7/2020 </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> Signature of person making this request Date </div> <hr/> <div style="display: flex; justify-content: space-between;"> Supervisor (if required) Date </div> <hr/> <div style="display: flex; justify-content: space-between;"> Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date </div>			
Directions for including supporting documents: <ol style="list-style-type: none"> 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting. 			

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Megan Glaeser, Bureau Assistant		2) Date When Request Submitted: February 24, 2020 <small>Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting</small>	
3) Name of Board, Committee, Council, Sections: Accounting Examining Board			
4) Meeting Date: March 4, 2020	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Administrative Matters: 1) Election of Officers, Appointment of Liaisons and Alternates, and Delegation of Authorities	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required: N/A	
10) Describe the issue and action that should be addressed: 1) The Board should conduct Election of its Officers for 2020. 2) The new Chairperson should review and appoint/reappoint Liaisons and Alternates as appropriate. 3) The Board should review and then consider continuation or modification of previously delegated authorities.			
11) Authorization			
Megan Glaeser <hr/> Signature of person making this request		February 24, 2020 <hr/> Date	
<hr/> Supervisor (if required)		<hr/> Date	
<hr/> Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date			
Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.			

Accounting Examining Board 2019 Officers, Liaisons, and Authorities

2019 ELECTION RESULTS	
Board Chair	Gerald Denor
Vice Chair	2019: John Scheid Elected at January 31, 2020 meeting: Michael Friedman
Secretary	David Schlichting
2019 LIAISON APPOINTMENTS	
Credentialing Liaison(s)	Gerald Denor, David Schlichting, Susan Strautmann
Monitoring and Professional Assistance Procedure (PAP) Liaison(s)	Gerald Denor
Legislative Liaison	Robert Misey, John Scheid
Travel Liaison	Gerald Denor
Newsletter Liaison(s)	Gerald Denor Alternate: John Scheid
Screening Panel *Screening panel updated at the 6/7 meeting. See table below.	Gerald Denor, John Scheid, Robert Misey, John Reinemann, David Schlichting, Susan Strautmann

2019 SCREENING PANEL	
Screening Panel Team 1	Gerald Denor, David Schlichting
Screening Panel Team 2	Joan Phillips, Susan Strautmann
Alternating Public Members	John Reinemann, Robert Misey

Delegation Motions

Document Signature Delegations

MOTION: John Scheid moved, seconded by David Schlichting, to delegate authority to the Chairperson (or in absence of the Chairperson, the highest-ranking officer or longest serving board member in that succession) to sign documents on behalf of the Board in order to carry out its duties. Motion carried unanimously.

MOTION: John Scheid moved, seconded by John Reinemann, in order to carry out duties of the Board, the Chairperson (or in absence of the Chairperson, the highest-ranking officer or longest serving board member in that succession) has the ability to delegate signature authority for purposes of facilitating the completion of assignments during or between meetings. The members of the Board hereby delegate to the Executive Director or DPD Division Administrator, the authority to sign on behalf of a board member as necessary. Motion carried unanimously.

Delegated Authority for Urgent Matters

MOTION: John Scheid moved, seconded by John Reinemann, that in order to facilitate the completion of urgent matters between meetings, the Board delegates its authority to the Chairperson (or in the absence of the Chairperson, the highest-ranking officer or longest serving board member in that succession), to appoint liaisons to the Department to act in urgent matters. Motion carried unanimously.

Monitoring Delegations

MOTION: David Schlichting moved, seconded by John Scheid, to adopt the “Roles and Authorities Delegated to the Monitoring Liaison and Department Monitor” as presented. Motion carried unanimously.

Credentialing Authority Delegations

MOTION: John Scheid moved, seconded by Gerald Denor, to grant certification and licensure to certified public accountants that have been reviewed and approved by the credentialing liaison(s) in between Board meetings. DSPS Staff will submit a list of new licensees that were approved between meetings to each Board meeting agenda. Motion carried unanimously.

Delegation of Authority to Credentialing Liaison

MOTION: Gerald Denor moved, seconded by David Schlichting, to delegate authority to the Credentialing Liaison(s) to serve as a liaison between DSPS and the Board and to act on behalf of the Board in regard to credentialing applications or questions presented to them. Motion carried unanimously.

Delegation of Authority to DSPS When Credentialing Criteria is Met

MOTION: John Scheid moved, seconded by Gerald Denor, to delegate credentialing authority to DSPS to act upon applications that meet all credentialing statutory and regulatory requirements without Board or Board liaison review. Motion carried unanimously.

Delegation of Authority for Conviction Reviews

MOTION: David Schlichting moved, seconded by Gerald Denor, to delegate authority to the Department Attorneys to review and approve convictions which do not relate substantially to the practice of accounting. Motion carried unanimously.

Delegated Authority for Application Denial Reviews

MOTION: David Schlichting moved, seconded by John Reinemann, that the Department's Attorney Supervisors, DLSC Administrator, or their designee are authorized to serve as the Board's designee for purposes of reviewing and acting on requests for hearing as a result of a denial of a credential. Motion carried unanimously.

Voluntary Surrenders

MOTION: David Schlichting moved, seconded by Gerald Denor, to delegate authority to the assigned case advisor to accept or refuse a request for voluntary surrender pursuant to Wis. Stat. § 440.19 for a credential holder who has a pending complaint or disciplinary matter. Motion carried unanimously.

Authorization for DSPS to Provide Board Member Contact Information to National Regulatory Related Bodies

MOTION: John Reinemann moved, seconded by Robert Misey, to authorize DSPS staff to provide national regulatory-related bodies with all Board member contact information that DSPS retains on file. Motion carried unanimously.

Optional Renewal Notice Insert Delegation

MOTION: Gerald Denor moved, seconded by David Schlichting to designate the Chairperson (or in the absence of the Chairperson, the highest-ranking officer or longest serving board member in that succession) to provide a brief statement or link relating to board-related business within the license renewal notice at the Board's or Board designee's request. Motion carried unanimously.

Legislative Liaison Delegation

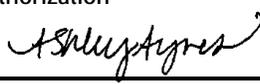
MOTION: David Schlichting moved, seconded by Robert Misey, to delegate authority to the Legislative Liaisons to speak on behalf of the Board regarding legislative matters. Motion carried unanimously.

Travel Delegation

MOTION: John Scheid moved, seconded by Gerald Denor, to delegate authority to the Travel Liaison to approve any board member travel. Motion carried unanimously.

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Ashley Ayres Monitoring and Intake Supervisor Division of Legal Services and Compliance		2) Date When Request Submitted: December 31, 2019 Items will be considered late if submitted after 4:30 p.m. and less than: <ul style="list-style-type: none"> ▪ 10 work days before the meeting for Medical Board ▪ 14 work days before the meeting for all others 	
3) Name of Board, Committee, Council, Sections: Accounting Examining Board			
4) Meeting Date: March 4, 2020	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Appointment of Monitoring Liaison and Delegated Authorities	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes (Fill out Board Appearance Request) <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required:	
10) Describe the issue and action that should be addressed: <ol style="list-style-type: none"> 1. Appoint primary and alternate Monitoring liaisons. 2. Adopt or reject the Roles and Authorities Delegated to the Monitoring Liaison and Department Monitor document as presented in today's agenda packet. 3. Delegate authority to Board Counsel to sign Monitoring orders on behalf of the Board/Section, after the Board/Section has taken action on Monitoring agenda items. <p><i>Current practice is for Department Monitors to draft Monitoring orders after Board meetings, send them to Board Counsel for review, and then send them to the Executive Director for subsequent review and signature. With the new proposed process, Department Monitors would only send their orders to Board Counsel for review and signature, eliminating the need for a second review by the Executive Director.</i></p>			
11) Authorization <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;">  </div> <div style="width: 35%; text-align: right;"> December 31, 2019 </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;">Signature of person making this request</div> <div style="width: 35%; text-align: right;">Date</div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;">Supervisor (if required)</div> <div style="width: 35%; text-align: right;">Date</div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;">Executive Director signature (indicates approval to add post agenda deadline item to agenda)</div> <div style="width: 35%; text-align: right;">Date</div> </div>			
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Roles and Authorities Delegated to the Monitoring Liaison and Department Monitor

The Monitoring Liaison (“Liaison”) is a Board/Section designee who works with department monitors to enforce Board/Section orders as explained below.

Current Authorities Delegated to the Monitoring Liaison

The Liaison may take the following actions on behalf of the Board/Section:

1. Grant a temporary reduction in random drug screen frequency upon Respondent’s request if he/she is unemployed and is otherwise compliant with Board/Section order. The temporary reduction will be in effect until Respondent secures employment in the profession. The Department Monitor (“Monitor”) will draft an order and sign on behalf of the Liaison.
2. Grant a stay of suspension if Respondent is eligible per the Board/Section order. The Monitor will draft an order and sign on behalf of the Liaison.
3. Remove the stay of suspension if there are repeated violations or a substantial violation of the Board/Section order. In conjunction with removal of any stay of suspension, the Liaison may prohibit Respondent from seeking reinstatement of the stay for a specified period of time. The Monitor will draft an order and sign on behalf of the Liaison.
4. Grant or deny approval when Respondent proposes continuing/remedial education courses, treatment providers, mentors, supervisors, change of employment, etc. unless the order specifically requires full-Board/Section approval.
5. Grant a maximum of one 90-day extension, if warranted and requested in writing by Respondent, to complete Board/Section-ordered continuing education.
6. Grant a maximum of one extension or payment plan for proceeding costs and/or forfeitures if warranted and requested in writing by Respondent.
7. Grant full reinstatement of licensure if Respondent has fully complied with all terms of the order without deviation. The Monitor will draft an order and obtain the signature or written authorization from the Liaison.
8. Grant or deny a request to appear before the Board/Section in closed session.
9. Board Monitoring Liaison may determine whether Respondent’s petition is eligible for consideration by the full Board/Section.
10. (*Except Pharmacy*) Accept Respondent’s written request to surrender credential. If accepted by the Liaison, Monitor will consult with Board Counsel to determine if a stipulation is necessary. If a stipulation is not necessary, Monitor will draft an order and sign on behalf of the Liaison. If denied by the Liaison, the request to surrender credential will go to the full Board for review.
11. (*Except Pharmacy*) Grant Respondent’s petition for a reduction in drug screens per the standard schedule, below. If approved, Monitor will draft an order and sign on behalf of the Liaison.
 - a. Year 1: 49 screens (including 1 hair test, if required by original order)
 - b. Year 2: 36 screens (plus 1 hair test, if required by original order)
 - c. Year 3: 28 screens plus 1 hair test
 - d. Year 4: 28 screens plus 1 hair test
 - e. Year 5: 14 screens plus 1 hair test

12. (*Dentistry only*) – Ability to approve or deny all requests from a respondent.

13. (*Except Nursing*) – Board Monitoring Liaison may approve or deny Respondent's request to be excused from drug and alcohol testing for work, travel, etc.

Current Authorities Delegated to the Department Monitor

The Monitor may take the following actions on behalf of the Board/Section, draft an order and sign:

1. Grant full reinstatement of licensure if CE is the sole condition of the limitation and Respondent has submitted the required proof of completion for approved courses.
 2. Suspend the license if Respondent has not completed Board/Section-ordered CE and/or paid costs and forfeitures within the time specified by the Board/Section order. The Monitor may remove the suspension and issue an order when proof completion and/or payment have been received.
 3. Suspend the license (or remove stay of suspension) if Respondent fails to enroll and participate in an Approved Program for drug and alcohol testing within 30 days of the order, or if Respondent ceases participation in the Approved Program without Board approval. This delegated authority only pertains to respondents who must comply with drug and/or alcohol testing requirements.
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**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Kimberly Wood, Program Assistant Supervisor-Adv.		2) Date When Request Submitted: 11/27/2019	
Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting			
3) Name of Board, Committee, Council, Sections: Accounting Examining Board			
4) Meeting Date: 3/4/2020	5) Attachments: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6) How should the item be titled on the agenda page? 2020 Meeting Dates	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required: N/A	
10) Describe the issue and action that should be addressed: Please review the finalized 2020 meeting dates. Any conflicts should be identified so to ensure quorum. 3/4/2020 6/17/2020 9/2/2020 12/2/2020			
11) Authorization			
Kimberly Wood		11/27/19	
Signature of person making this request		Date	
Supervisor (if required)		Date	
Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date			
Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.			

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: James Kuehn, LPPA		2) Date When Request Submitted: 2/18/2020 Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting									
3) Name of Board, Committee, Council, Sections: Accounting Examining Board											
4) Meeting Date: 03/04/2020	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Credentialing Matters 1. Certified Public Accountants Certified and Licensed Since Last Review Meeting 2. Firms Licensed Since Last Review Meeting									
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required: N/A									
10) Describe the issue and action that should be addressed: Informational – No Action: List of Certified Public Accountants certified and licensed, and firms licensed since last review meeting on November 21, 2019.											
11) Authorization <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%; border-top: 1px solid black; border-bottom: 1px solid black;">James Kuehn</td> <td style="width: 30%; border-top: 1px solid black; border-bottom: 1px solid black; text-align: right;">2/18/2020</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Signature of person making this request</td> <td style="border-bottom: 1px solid black; text-align: right;">Date</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Supervisor (if required)</td> <td style="border-bottom: 1px solid black; text-align: right;">Date</td> </tr> <tr> <td colspan="2" style="border-bottom: 1px solid black;">Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date</td> </tr> </table>				James Kuehn	2/18/2020	Signature of person making this request	Date	Supervisor (if required)	Date	Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date	
James Kuehn	2/18/2020										
Signature of person making this request	Date										
Supervisor (if required)	Date										
Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date											
Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.											

A. Certified Public Accountants Certified and Licensed Since Last Review Meeting:

1. 27451-1; Andersen, Emily
2. 27452-1; Gratz, Kyle
3. 27453-1; Daniels, Zachary
4. 27454-1; Adler, Matthew
5. 27455-1; Bollig, Joshua
6. 27456-1; Marciniak, Deanna
7. 27457-1; Vander Pas, Carly
8. 27458-1; Condon, Emily
9. 27459-1; Jalensky, Nicholas
10. 27460-1; Kestly, Chaz
11. 27461-1; Maly, Anna
12. 27462-1; Multerer, Caitlin
13. 27463-1; Gross, Julie
14. 27464-1; Horner, Alex
15. 27465-1; Lahiff, Nicole
16. 27466-1; Harden, Patrick
17. 27467-1; Wallschlaeger, Jill
18. 27468-1; Mallaro, Jack
19. 27469-1; Burwell, Marta
20. 27470-1; Glenz, Kaitlin
21. 27471-1; Heider, Mitchell
22. 27472-1; Fangmeier, Chase
23. 27473-1; Plack, Robert
24. 27474-1; Emery, Samantha
25. 27475-1; Petzold, Amanda
26. 27476-1; Czech, Jaclyn
27. 27477-1; Prah, Matthew
28. 27478-1; Ahn, Kyung Jun
29. 27479-1; Knutson, Kelsey
30. 27480-1; Klinski, Leslie
31. 27481-1; Kopanon, Peter
32. 27482-1; Barber, Jaqueline
33. 27483-1; Boknevitcz, Catherine
34. 27484-1; Gabriel, Pamela
35. 27485-1; Gareis, Dalton
36. 27486-1; Jentges, Jaret
37. 27487-1; Hodson, Sierra
38. 27488-1; McElmury, Jake
39. 27489-1; Stafford, Alan
40. 27490-1; Voss, Vanessa
41. 27491-1; Nadas, Amanda
42. 27492-1; Mallon, Jessica
43. 27493-1; Johnson, Nicole
44. 27494-1; Heckenkamp, Nicholas
45. 27495-1; Baker, Martha
46. 27496-1; Johnson, Michael
47. 27497-1; Covek, Jonathan
48. 27498-1; LaCount, Danielle
49. 27499-1; Burnette, Jillian
50. 27500-1; Van Rossum, Sara
51. 27501-1; Hill, Maggie
52. 27502-1; Blumenshine, Rachel
53. 27503-1; Laihinen, Jacob
54. 27504-1; Wagner, Sarah
55. 27505-1; Grabowski, Joesph
56. 27506-1; Adams, Bradley
57. 27507-1; Colwell, Alexander
58. 27508-1; Booth, Christine
59. 27509-1; Odebiyi, Bobola
60. 27510-1; Wedig, Jacob
61. 27511-1; DeKemper, Connie
62. 27512-1; Chamberlain, Shannon
63. 27513-1; Gehant, Zach
64. 27514-1; Krahn, Elizabeth
65. 27515-1; Madison, Laura
66. 27516-1; Stingle, Jennifer
67. 27517-1; Lin, Tai Jung
68. 27518-1; Wilcox, Connor
69. 27519-1; Norby, Derek
70. 27520-1; Johnson, Cassandra
71. 27521-1; Pless, Ashley
72. 27522-1; Brown, Amy
73. 27523-1; Feuling, Amy
74. 27524-1; Mueller, Alex
75. 27525-1; Vaplon, Lexi
76. 27526-1; Mouzakitis, Chris
77. 27527-1; Masters, Rebecca
78. 27528-1; Brooks, Krista
79. 27529-1; Paeth, Donald
80. 27530-1; Lindholm, Kaitlin
81. 27531-1; Rhea, William
82. 27532-1; Petrovic, Katarina
83. 27533-1; Schroeder, Scott
84. 27534-1; McLean, Steven
85. 27535-1; Mirsberger, Matthew
86. 27536-1; Ramsden, Dallas
87. 27537-1; Wahdan, Dania
88. 27538-1; Glaser, Kelsey
89. 27539-1; Rich, Maura
90. 27540-1; Szczepanek, Daniel
91. 27541-1; Angeles, Charlene
92. 27542-1; Lybeshari, Migena
93. 27543-1; Barr, David
94. 27544-1; Fuerstenberg, Sarah
95. 27545-1; Spera, Joseph
96. 27546-1; Alkhaldi, Dilcia
97. 27547-1; Collins, Richard
98. 27548-1; Johnson, Demetrius

99. 27549-1; Maurice, Emily
100. 27550-1; McFarlane, Michael
101. 27551-1; Schafer, Michael
102. 27552-1; Hintz, Joshua
103. 27553-1; Fabry, Katelin
104. 27554-1; Schimp, Thomas
105. 27555-1; Patrie, Macey
106. 27556-1; Henry, Kayla
107. 27557-1; Lu, Jing
108. 27558-1; Aprahamian, Megan
109. 27559-1; Sippl, Richard
110. 27560-1; Jacobs, Sophie
111. 27561-1; Nickelson, Parker
112. 27562-1; Pionek, Chloe
113. 27563-1; Lyons, Shannon
114. 27564-1; Otto, Jeffrey
115. 27565-1; Frey, Brooke
116. 27566-1; Rukamp, Marissa
117. 27567-1; Los, Lukasz
118. 27568-1; Ziegler, Daniel
119. 27569-1; Brugger, Daniel
120. 27570-1; Repins, Kristin
121. 27571-1; Swerdlow, Lucas
122. 27572-1; Bjorkman, Nathan
123. 27573-1; Hucko, Linda
124. 27574-1; Matelon, Henry
125. 27575-1; Maritn, Christopher
126. 27576-1; Meinholz, Tanner
127. 27577-1; Miller, Emily
128. 27578-1; Weltcheff, Jack
129. 27579-1; Miller, Nathan
130. 27580-1; Fangfang, Li
131. 27581-1; Kozberg, Mollie
132. 27582-1; Durall, Alyssa
133. 27583-1; Noye, Nicholas
134. 27584-1; Belknapp, Jamison
135. 27585-1; Muzik, Ryan
136. 27586-1; Raffel, Darby
137. 27587-1; Vershave, Lauren
138. 27588-1; Wang, Lu
139. 27589-1; Koepsell, Catilin
140. 27590-1; Patel, Krishna
141. 27591-1; Asher, Ethan
142. 27592-1; Leonard, Shelby
143. 27593-1; Olson, Luke
144. 27594-1; Musser, Casey
145. 27595-1; Malone, Patrick
146. 27596-1; Johnson, Griffin
147. 27597-1; Esker, Tristin
148. 27598-1; Leithold, Katelyn
149. 27599-1; Marsolek, Kaitlyn
150. 27600-1; Baudhuin, Michael
151. 27601-1; Overmoyer, Philip
152. 27602-1; Potaracke, Paige
153. 27603-1; Durdan, Nolan
154. 27604-1; Trautman, Eric
155. 27605-1; Jaeger, Brandon
156. 27606-1; Conard, Michael
157. 27607-1; Neises, Karina
158. 27608-1; Gander, Jennifer
159. 27609-1; Knuth, Nicholas
160. 27610-1; Beard, Alicia
161. 27611-1; Hartje, Jennifer
162. 27612-1; Yang, Nan
163. 27613-1; Eaglin, Ting
164. 27614-1; Kaloti, Amir
165. 27615-1; Rote, Levi
166. 27616-1; Schanock, Garth
167. 27617-1; Zeilstra, Timothy
168. 27618-1; Mueller, Alex
169. 27619-1; Noone, Charles
170. 27620-1; Brehmer, Adam
171. 27621-1; Wittliff, Philip
172. 27622-1; Sweeney, Michael
173. 27623-1; Prcic, Mario
174. 27624-1; Nelson, Ryan
175. 27625-1; Johnson, Erin
176. 27626-1; Staaland, Elizabeth
177. 27627-1; Hageman, Lauren
178. 27628-1; Sauer, Rachel
179. 27629-1; Winchell, Jason
180. 27630-1; Brattset, Kaitlyn
181. 27631-1; Decker, Austin
182. 27632-1; Salfer, John
183. 27633-1; Boyce, Maura
184. 27634-1; Lin, Meijie
185. 27635-1; Gonring, Blake
186. 27636-1; Sucharski, Braeden
187. 27637-1; Wolfenberg, Jacob
188. 27638-1; Roose, Gina
189. 27639-1; VanDenBerg, Vicki
190. 27640-1; Grant, James
191. 27641-1; Kronberger, Bryan
192. 27642-1; Nguyen, Trung

**Denotes applicants who were certified and licensed pursuant to Board delegated conviction review authority. (Motion on 2/8/2018).*

2. Firms Licensed Since Last Review Meeting

1. 1572-3; Lisa A. Spaay CPA LLC
2. 1573-3; Simple Accounting, LLC
3. 1574-3; George Dimov CPA
4. 1575-3; Mathison & Oswald CPAs
5. 1576-3; Dietschweiler CPA LLC
6. 1577-3; Komisar CPA, Inc