

## SW Rules Committee – Agenda

**Date:** May 14<sup>th</sup>, 2025

**Location:** [Zoom](#)

10:00am- 10:05am	Welcome & Call to Order	Chair
10:05am -10:10am	Roll Call	CSG
Name	State	Present
Dr. Hyacinth Mckee	LA	X
Youa Yang	MN	X
Angela Fileccia	ME	X
David Fye	KS	X
Jaime Hoyle	VA	X
Justin Bennett	MO	X
10:10am – 10:15am	Review and Adopt Agenda*	Chair
<ul style="list-style-type: none"> <li>○ Motion: Angela Fileccia moves to adopt the agenda</li> <li>○ Second: David Fye seconded</li> </ul>		
10:15am – 10:20am	Review and Adopt Draft Meeting Minutes*	Chair
<ul style="list-style-type: none"> <li>○ Motion: David Fye moves to approve draft meeting minutes</li> <li>○ Second: Jaime Hoyle seconded the motion</li> </ul>		
10:20am – 10:25am	Review Commission Feedback on Draft Qualifying National Exam Rule	Chair/ CSG
<ul style="list-style-type: none"> <li>○ Kaitlyn Bison introduced the feedback received from Ohio, stating that the advanced Generalists should come in under the Clinical category instead of masters.</li> <li>○ Samantha Nance clarified that most states' Advanced Generalists operate under a master's-level license rather than a clinical one and expressed concern about treating those differently. If Ohio's case is an outlier, the focus should remain on commonalities across states.</li> <li>○ Angela Fillecia raised related points (comment not fully detailed).</li> <li>○ Youa Yang agreed, noting that Minnesota does not offer a clinical scope of practice for this category and it doesn't align with their licensure framework.</li> <li>○ Justin Bennett indicated uncertainty about who resolves such discrepancies but stated that individuals already licensed might be grandfathered in. Ohio would need to provide clarification on their process.</li> </ul>		

- Dr. McKee noted that the Rules Committee would be responsible for drafting any rule changes, which would then be reviewed by the Executive Committee.
- Samantha Nance emphasized that Ohio's responsibility is to determine whether it can issue a multistate license under the relevant categories. She stated that this should not require confrontation with the Attorney General or a new exam under the clinical category. Echoing Justin, she requested more information from Ohio to properly assess the situation. Most participants seemed to agree that this case does not fall within standard categories, and Ohio should clarify how it handles such licensure types.
- It was acknowledged that the rule could be amended or expanded later to better capture these edge cases.
- Dr. McKee reiterated that Ohio may not be the only state issuing advanced generalist licenses, and any rule created should account for broader state practices.
- David Fye recommended that the group not make any immediate changes but instead take time to research how various states handle this issue.
- Justin Bennett added that Missouri issues advanced generalist licenses, but not for clinical practice. He noted that the LMASW category isn't fully addressed in the current statute and more information from other member states would be needed to draft an appropriate rule.
- Dr. McKee mentioned being aware of another state that issues advanced generalist licenses with a clinical scope and suggested gathering additional research to identify which states might be affected.
- David Fye advised opening the floor to more public comment before proceeding with any motion. He emphasized the need for broader input.
- Motion: David Fye moved to delay any rule changes pending further research.  
Second: Justin Bennett (MO).
- Justin Bennett provided final remarks, first with a technical observation and then a broader commentary on the national exam. He suggested the group consider more accountability from the exam body and recommended a closer review of existing exam issues before full adoption of related rules.

10:25am – 10:35am

Next Steps and Explanation of  
Hearing Process

Interim Legal  
Counsel

- Samantha Nance recommended a motion for additional research, emphasizing that this is not the immediate next step. She suggested gathering more information about the advanced generalist designation and establishing consensus before moving forward.
  - She discussed that once a final draft rule is prepared, it would be published for public comment in accordance with the commission's formal rulemaking procedures.

- Upon publication, there will be a 30-day public notice period during which stakeholders can provide comments on the draft rule. The commission will then determine whether to adopt the rule based on the feedback received.
- If all public comments support the rule and no modifications are proposed, the commission can proceed to adopt the rule as written.
- If substantive modifications are proposed, the rule would need to be referred for further drafting. The full commission would then reconvene to review public comments and vote on a revised version.
- It was suggested that a poll of the full commission be conducted to better understand how individual states are currently handling the advanced generalist exam before any formal notice is published.
- Dr. McKee stated that a survey will be distributed to all commission members to determine how relevant the issue is across states and whether further action is warranted

10:35am – 10:50am

Future Rules for Consideration:  
*Uniform Dataset*

Chair/ Interim Legal  
Counsel

- Samantha Nance initiated discussion on beginning a basic framework for a new rule regarding the adoption of a uniform dataset.
  - She emphasized that regardless of the system used, there must be uniformity in the type of data states are required to provide, such as identifying information and adverse actions (including presence of investigations).
  - There is a known challenge with multiple categories of multistate licensure and a multi-tiered approach—advanced generalist licensure may decline as a result.
- Dr. McKee introduced a draft rule and requested feedback before moving it to the Executive Committee. However, the group must first finalize the rule on the qualifying national exam, which has created ripple effects in the drafting process.
- Angela asked about the appendix; Samantha clarified that it will come later from the vendor.
  - Angela added that submitting data weekly is a heavy lift for many states; monthly submissions may be more feasible.
  - There was consensus to eliminate Social Security Numbers from the dataset requirements.
- Samantha Nance noted a growing trend of states avoiding SSNs and emphasized the importance of using unique identifiers instead.
  - Matt agreed, noting that several states no longer collect SSNs. He suggested that the data system might generate unique identifiers and recommended removing SSNs from the requirements.
- Angela recommended integrating the existing database infrastructure to avoid duplicative work.

- Samantha Nance raised a question about the cost associated with pulling data from external sources as opposed to states submitting it directly.
- Matt reported that states have received feedback suggesting the National Practitioner Data Bank is not a reliable or uniformly used source. A separate, mandatory reporting system would be more effective.
- Angela H. asked for clarification on how adjudications and final outcomes of adverse actions should be reported.
- David Fye supported a requirement to report only the final resolution, suggesting that a 10-day notice requirement may be too vague.
  - Samantha Nance clarified that “adverse action” and “significant information” are already defined in statute. The system uses a flag (yes/no), and pending investigations are flagged if not groundless. Timing of resolution is within the state’s purview.
- Angela recommended further defining what constitutes a reportable event for state boards. For example, if a complaint is filed in January and resolved 6–9 months later, the system should be able to indicate whether the issue is significant—even if legally unresolved.
  - David Fye raised questions about:
    - Whether the system would indicate presence of a background check
    - Associated API costs
    - Access to former or maiden names, and whether these would be displayed or only available upon request
- Justin Bennett noted that NPIs (National Provider Identifiers) are not reliable, particularly for private-pay providers.
  - Missouri uses a unique license number, but not all states do. He suggested exploring the idea of a random number generator, as NPIs may not be a viable universal ID.
- Youa Yang asked for clarification on whether shared data would be visible to all applicant individuals.
  - Samantha Nance replied that in a multistate licensure model, applicants would have visibility. However, states may not delineate certain designations, so systems often show a broader view of what’s shared. The system won’t parse all differences logistically.
- Dr. McKee confirmed that additional research is needed on advanced generalist licenses before finalizing the draft rule.
  - Kaitlyn was tasked with sending a survey to all states ahead of the next Executive Committee meeting.
- The group agreed to continue developing the uniform dataset rule, and to present draft recommendations to the Executive Committee.

- Motion: David Fye moved to forward the language in Section 1.1(c) regarding bachelor's-level exam participation to the Executive Committee.
- Second: by Jaime Hoyle
- Motion carried
- Justin Bennett made a brief note regarding the Executive Committee's upcoming involvement.
  - Dr. McKee asked for any additional recommendations to be submitted to Kaitlyn, who will include them in the survey.

10:50am – 10:55am	Delegate Questions and Comments	Chair
-------------------	---------------------------------	-------

- No question received.

10:55am – 11:00am	Public Questions and Comments	Chair
-------------------	-------------------------------	-------

- No public comment received.

11:00am	Adjourn*	Chair
---------	----------	-------

- Motion: David Fye makes a motion to adjourn.
- Second: Jaime Hoyle seconds the motion.
- Motion carries and meeting adjourns.

\* Indicates agenda item requires Rules Committee vote