

## LOBBYING REPORT

Lobbying Disclosure Act of 1995 (Section 5) - **All Filers Are Required To Complete This Page**

1. Registrant Name:

**AMERICAN OCCUPATIONAL THERAPY ASSN**

2. Address:

4720 MONTGOMERY LANE, P.O. BOX 31220, BETHESDA, MD 20824-1220

3. Principal place of business (if different from line 2):

4. Contact Name: DARLENE C DENNIS

Telephone: 3016522682

E-mail (optional): ddennis@aota.org

Senate ID #: 2970-12

House ID #:

7. Client Name: ☒ Self

## TYPE OF REPORT

8. Year 2007 Midyear (January 1 - June 30): ☒ **OR** Year End (July 1 - December 31): ☐

9. Check if this filing amends a previously filed version of this report: ☐

10. Check if this is a Termination Report: ☐ => Termination Date: 11. No Lobbying Activity: ☐

## INCOME OR EXPENSES

Complete Either Line 12 **OR** Line 13

### 12. Lobbying Firms

**INCOME** relating to lobbying activities for this reporting period was:

Less than \$10,000: ☐

\$10,000 or more: ☐ => Income (nearest \$20,000): \_\_\_\_\_

Provide a good faith estimate, rounded to the nearest \$20,000, of all lobbying related income from the client (including all payments to the registrant by any other entity for lobbying activities on behalf of the client).

### 13. Organizations

**EXPENSES** relating to lobbying activities for this reporting period were:

Less than \$10,000: ☐

\$10,000 or more: ☒ => Expenses (nearest \$20,000): 280,000.00

### 14. Reporting Method.

Check box to indicate expense accounting method. See instructions for description of options.

☒ **Method A.** Reporting amounts using LDA definitions only

☐ **Method B.** Reporting amounts under section 6033(b)(8) of the Internal Revenue Code

☐ **Method C.** Reporting amounts under section 162(e) of the Internal Revenue Code

### LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: BUD (one per page)

16. Specific lobbying issues:

"H.R. 3043, Departments of Labor, Health and Human Services and Education and Related Agencies Appropriations Act, Provisions related to inclusion of funding specific to occupational therapy and education. "S. 1710, Departments of Labor, Health and Human Services and Education and Related Agencies Appropriations Act, provisions related to inclusion of funding specific to occupational therapy and education."

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL

Covered Official Position (if applicable): N/A

Name: METZLER, CHRISTINA A.

Covered Official Position (if applicable): N/A

Name: NANO, TIM

Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above. **None**

## LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: EDU (one per page)

16. Specific lobbying issues:

H.R. 1134, Physical Therapist Student Loan Repayment Eligibility Act of 2007, advocated for inclusion of occupational therapy. No bill number - No Child Left Behind (NCLB) Reauthorization - advocated for an expanded role for occupational therapy with general education students and for providing testing accommodations for students with disabilities. Issues addressed included early intervening funds, RTI and PBS inclusion. Office of Special Education Programs, Director Alexa Posney: Advocated about the role of occupational therapy under the Individuals With Disabilities Education Act (IDEA) and No Child Left Behind (NCLB). S. 578 and H.R. 1017, Protecting Children's Health in Schools Act - Provisions related to maintaining Medicaid funding for school based administrative claiming and transportation services.

17. House(s) of Congress and Federal agencies contacted:  
Education, Dept of  
HOUSE OF REPRESENTATIVES  
SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL  
Covered Official Position (if applicable): N/A  
Name: METZLER, CHRISTINA A.  
Covered Official Position (if applicable): N/A  
Name: NANO, TIM  
Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above. **None**

## LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: HCR (one per page)

16. Specific lobbying issues:

S. 558, Mental Health Parity Act of 2007 - Supported improved coverage and advocated for an expanded role for occupational therapy. S. 845, Safety of Seniors Act of 2007 - Supported passage and highlighted role of occupational therapy in preventing senior falls. HR 2260, Health Care Truth and Transparency Act of 2007 - Opposed legislation as it is an undue burden on non-physician health care providers and does not improve quality or patient safety. S. 358 and HR 493, Genetic Information Nondiscrimination Act of 2007 - Support passage to help prevent discrimination in regard to insurance for health care coverage. No bill number: Advocated for and educated about the role of occupational therapy in mental health. No bill number: Advocated for and educated about the role of occupational therapy in Veteran's health care. HR 1424 and HR 1367, The Paul Wellstone Mental Health and Addiction Equity Act of 2007 - Supported improved coverage and advocated for an expanded role for occupational therapy.

17. House(s) of Congress and Federal agencies contacted:  
HOUSE OF REPRESENTATIVES  
SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL  
Covered Official Position (if applicable): N/A  
Name: METZLER, CHRISTINA A.  
Covered Official Position (if applicable): N/A  
Name: NANOFF, TIM  
Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above. **None**

## LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: INS (one per page)

16. Specific lobbying issues:

S. 558, Mental Health Parity Act of 2007 - Supported improved coverage and advocated for an expanded role for occupational therapy. HR 2260, Health Care Truth and Transparency Act of 2007 - Opposed legislation as it is an undue burden on non-physician health care providers and does not improve quality or patient safety. S. 358 and HR 493, Genetic Information Nondiscrimination Act of 2007 - Support passage to help prevent discrimination in regard to insurance for health care coverage. HR 1424 and HR 1367, The Paul Wellstone Mental Health and Addiction Equity Act of 2007 - Supported improved coverage and advocated for an expanded role for occupational therapy.

17. House(s) of Congress and Federal agencies contacted:  
HOUSE OF REPRESENTATIVES  
SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL  
Covered Official Position (if applicable): N/A  
Name: METZLER, CHRISTINA A.  
Covered Official Position (if applicable): N/A  
Name: NANOFF, TIM  
Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above. **None**

**LOBBYING ACTIVITY.**

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: LBR (one per page)

16. Specific lobbying issues:

No activity this period

17. House(s) of Congress and Federal agencies contacted: **None**

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL

Covered Official Position (if applicable): N/A

Name: METZLER, CHRISTINA A.

Covered Official Position (if applicable): N/A

Name: NANO, TIM

Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above: **None**

### LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: MED (one per page)

16. Specific lobbying issues:

S. 845, Safety of Seniors Act of 2007. - Supported passage and highlighted the role of occupational therapy in preventing senior falls.

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL

Covered Official Position (if applicable): N/A

Name: METZLER, CHRISTINA A.

Covered Official Position (if applicable): N/A

Name: NANO, TIM

Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above. **None**

## LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: MMM (one per page)

16. Specific lobbying issues:

H.R. 1846, The Access to Physical Medicine and Rehabilitation Services Improvement Act of 2007 - Opposed based on quality, cost accountability and scope of practice concerns. S. 1224, Children's Health Insurance Program (CHIP) Reauthorization Act of 2007 - Advocated in support of the CHIP program and an expanded role for occupational therapy. H.R. 3162, Children's Health and Medicare Protections Act of 2007 (CHAMP), Advocated for Medicare provision regarding therapy caps, 75% rule, SGR cuts and Medicaid provisions. S. 799 and H.R. 1621, The Community Choice Act - Support all provisions. S. 578 and H.R. 1017, Protecting Children's Health in Schools Act, Support passage and maintaining Medicaid funding for school based administrative claiming and transportation services. S. 543 and H.R. 1459, Preserving Patient Access to Inpatient Rehabilitation Hospitals Act of 2007 - Support this legislation as it protects access to occupational therapy in inpatient rehabilitation facilities. H.R. 1809, Medicare Independent Living Act - Support the provision of improved access to mobility devices for people with disabilities. No bill number: Advocated for the promotion of occupational therapy in home health under Medicare. No bill number: Advocated for payment fixes to the Medicare Physician fee schedule. No bill number: Advocated and education about the role of occupational therapy in mental health practice. No bill number: Opposed proposed regulations impacting rehabilitation services option reimbursement under Medicaid. S. 450 and H.R. 748, The Medicare Access to Rehabilitation Services Act of 2007 - All provisions, passage.

17. House(s) of Congress and Federal agencies contacted:  
HOUSE OF REPRESENTATIVES  
SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL  
Covered Official Position (if applicable): N/A  
Name: METZLER, CHRISTINA A.  
Covered Official Position (if applicable): N/A  
Name: NANO, TIM  
Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above: **None**



Registrant Name: AMERICAN OCCUPATIONAL THERAPY ASSN Client Name: Self

### LOBBYING ACTIVITY.

Select as many codes as necessary to reflect the general issue areas in which the registrant engaged in lobbying on behalf of the client during the reporting period. Using a separate page for each code, provide information as requested. Attach additional page(s) as needed.

15. General issue area code: WEL (one per page)

16. Specific lobbying issues:

no activity this period

17. House(s) of Congress and Federal agencies contacted: **None**

18. Name of each individual who acted as a lobbyist in this issue area:

Name: JONES, DANIEL

Covered Official Position (if applicable): N/A

Name: METZLER, CHRISTINA A.

Covered Official Position (if applicable): N/A

Name: NANO, TIM

Covered Official Position (if applicable): N/A

19. Interest of each foreign entity in the specific issues listed on line 16 above: **None**

Signature: ON FILE Date: Aug 13, 2007

Printed Name and Title: DARLENE C. DENNIS, POLITICAL ACTION COORDINATOR -

**Information Update Page:**

**Complete ONLY where registration information has changed.**

**LOBBYIST UPDATE**

**23. Name of each previously reported individual who is NO LONGER expected to act as a lobbyist for the client**

Name: REEDER, FRANKLIN K

**ISSUE UPDATE**

**24. General lobbying issues previously reported that NO LONGER pertain**

**AFFILIATED ORGANIZATIONS**

**25. Add the following organization(s)**

**26. Name of each previously reported organization that is NO LONGER affiliated with the registrant or client**

**FOREIGN ENTITIES**

**27. Add the following foreign entities**

**28. Name of each previously reported foreign entity the NO LONGER owns, OR controls, OR is affiliated with the registrant, client or affiliated organization**

Signature: ON FILE Date: Aug 13, 2007

Printed Name and Title: -