

|   |  |
|---|--|
| Clerk of the House of Representatives<br>Legislative Resource Center<br>B-106 Cannon Building<br>Washington, DC 20515 | Secretary of the Senate<br>Office of Public Records<br>232 Hart Building<br>Washington, DC 20510 |
|---|--|

RECEIVED  
SECRETARY OF THE SENATE  
PUBLIC RECORDS

00 FEB 17 AM 11:37

### LOBBYING REPORT

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

|  |  |
|--|--|
| 1. Registrant Name<br>The American Occupational Therapy Association, Inc. (AOTA)                                       |  |
| 2. Address <input type="checkbox"/> Check if different than previously reported<br>4720 Montgomery Lane, PO Box 31220  |  |
| 3. Principal Place of Business (if different from line 2)<br>City: Bethesda State/Zip (or Country) Maryland 20824-1220 |  |
| 4. Contact Name<br>Darlene C. Dennis   | Telephone<br>301-652-6611 ext. 2014<br>or 301-652-2682 |
| E-mail (optional)<br>darlened@aota.org   | 5. Senate ID #<br>2970-12                              |
| 7. Client Name <input checked="" type="checkbox"/> Self  | 6. House ID #<br>31617000                              |

TYPE OF REPORT 8. Year 1999 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  |   |
|--|---|
| <p><b>12. Lobbying Firms</b></p> <p>INCOME relating to lobbying activities for this reporting period was:</p> <p>Less than \$10,000 <input type="checkbox"/></p> <p>\$10,000 or more <input type="checkbox"/> ⇒ \$ _____<br/>Income (nearest \$20,000)</p> <p>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).</p> | <p><b>13. Organizations</b></p> <p>EXPENSES relating to lobbying activities for this reporting period were:</p> <p>Less than \$10,000 <input type="checkbox"/></p> <p>\$10,000 or more <input checked="" type="checkbox"/> ⇒ \$ <u>220,000.00</u><br/>Expenses (nearest \$20,000)</p> <p><b>14. REPORTING METHOD.</b> Check box to indicate expense accounting method. See instructions for description of options.</p> <p><input checked="" type="checkbox"/> Method A. Reporting amounts using LDA definitions only</p> <p><input type="checkbox"/> Method B. Reporting amounts under section 6033(b)(8) of the Internal Revenue Code</p> <p><input type="checkbox"/> Method C. Reporting amounts under section 162(e) of the Internal Revenue Code</p> |

Signature *Darlene C. Dennis*

Printed Name and Title Darlene C. Dennis, Political Action Administrator, AOTA

The American Occupational Therapy  
Registrant Name Association, Inc. 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 BUD (one per page)

16. Specific lobbying issues  
See Attachment

17. House(s) of Congress and Federal agencies contacted  Check if None  
U.S. House of Representatives  
U.S. Senate

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

| Name                 | Covered Official Position (if applicable) | New                      |
|----------------------|---|--------------------------|
| Christina A. Metzler |   | <input type="checkbox"/> |
| Frederick P. Somers  |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_  
Printed Name and Title \_\_\_\_\_

Attachment to Page 2

The American Occupational Therapy Association, Inc.

8. BUD

All provisions

H Con Res 84 Resolution Concerning Full Funding of the Individuals With Disabilities Education Act

All provisions, especially those related to occupational therapy services

HR 1736 Medicare Rehabilitation Benefit Equity Act of 1999

All provisions

S Con Res 25 Resolution Urging the Full Funding fo the Federal Governments Obligation Under the Individuals with Disabilities Education Act

The American Occupational Therapy  
Registrant Name Association, Inc. 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 EDU (one per page)

16. Specific lobbying issues

See Attachment

17. House(s) of Congress and Federal agencies contacted  Check if None

U.S. House of Representatives  
U.S. Senate

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

| Name                 | Covered Official Position (if applicable) | New                      |
|----------------------|---|--------------------------|
| Christina A. Metzler |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name and Title \_\_\_\_\_

## Attachment to Page 3

The American Occupational Therapy Association, Inc.

**B. EDU**

Provisions related to education of occupational therapy practitioners  
HR 1224 All-Payer Graduate Medical Education Act

Assure adherence to Individuals With Disabilities Education Act requirements  
HR 1272 Freedom to Learn Act

Assure continuation of services to children with disabilities  
HR 1295 Individuals With Disabilities Education Act, Amendment

All provisions  
HR 1672 Smart IDEA Act of 1999

Provisions related to services for individuals with disabilities  
HR 1960 Educational Excellence for All Children Act of 1999

Provisions related to occupational therapy services and discipline issues  
HR 636 Individuals with Disabilities Education Act

Provisions related to occupational therapy services and discipline issues  
HR 697 Individuals with Disabilities Education Act Amendment

Provisions related to education for occupational therapy practitioners  
S 114 Physical Therapy and Occupational Therapy Education Act of  
1999

Provisions related to individuals with disabilities and services provided  
S 1180 Educational Excellence Act for All Children of 1999

Provisions related to covered providers  
S 179 Rural Preventive Health Care Training Act of 1999

Provisions related to funding of Individuals With Disabilities Act  
S 277 Educational Opportunities and Excellence Act of 1999

The American Occupational Therapy  
Registrant Name Association, Inc. 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 188 (one per page)

16. Specific lobbying issues  
None this period

17. House(s) of Congress and Federal agencies contacted  Check if None

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

| Name               | Covered Official Position (if applicable) | New                      |
|--------------------|---|--------------------------|
| Kathryn M. Pontzer |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |
|                    |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name and Title \_\_\_\_\_

Registrant Name \_\_\_\_\_ Client Name \_\_\_\_\_

**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

See Attachment

17. House(s) of Congress and Federal agencies contacted  Check if None

U.S. House of Representatives  
U.S. Senate

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

| Name                | Covered Official Position (if applicable) | New                      |
|---------------------|---|--------------------------|
| Christina Metzler   |   | <input type="checkbox"/> |
| Frederick P. Somers |   | <input type="checkbox"/> |
| Kathryn M. Pontzer  |   | <input type="checkbox"/> |
|                     |   | <input type="checkbox"/> |
|                     |   | <input type="checkbox"/> |
|                     |   | <input type="checkbox"/> |
|                     |   | <input type="checkbox"/> |
|                     |   | <input type="checkbox"/> |
|                     |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name and Title \_\_\_\_\_

## Attachment to Page 5

The American Occupational Therapy Association, Inc.

6. HCR

Provisions related to patient/provider protections and access to occupational therapy services

HR 1133 Comprehensive Managed Care Health Reform Act of 1999

Provisions related to provider and patient protections under Managed Care and Coverage and Payment provisions for occupational therapy

HR 1200 American Health Security Act of 1999

Provisions related to availability and coverage of occupational therapy services

HR 1344 Triple-A Rural Health Improvement Act of 1999

All provisions, especially covered providers/services

HR 1515 Mental Health and Substance Abuse Parity

Provisions related to occupational therapy services availability and coverage

HR 16 Program of National Health Insurance, Provision

Provisions related to availability and coverage of occupational therapy services.

HR 1661 Public Health Service Act, Amendment; Employee Retirement Income Security Act of 1974, Amendment

Provisions related to occupational therapy providers

HR 1984 Elderly Protection Act

Provisions related to providers covered

HR 2043 Patient Right to Unrestricted Medical Advice Act of 1999

Provisions related to standards and protections for patients/providers, inclusion of occupational therapy practitioners

HR 2095 Employee Retirement Income Security Act of 1974, Amendment

Provisions related to coverage of occupational therapy services

HR 2116 Veterans' Millennium Health Care Act

All provisions

HR 216 Access to Quality Care Act

Provisions related to standards and protections of patients/providers, inclusion of occupational therapy providers

HR 2275 Employee Retirement Income Security Act

All provisions

HR 2723 Bipartisan Consensus Managed Care Improvement Act

Provisions related to patient/provider protections and access to occupational therapy services

HR 358 Patients' Bill of Rights Act of 1999

Continuation of Attachment to Page 5, The American Occupational Therapy Association, Inc. 8. HCR

Provisions related to standards for managed care plans and provider/patient protections

HR 448 Patient Protection Act of 1999

Provisions related to standards for managed care plans and provider/patient protections

HR 719 Managed Care Reform Act of 1999

Provisions related to patient/provider protections and access to occupational therapy services

S 1256 Patients Bill of Rights

Provisions related to provision and coverage of occupational therapy services.

S 1809 Developmental Disabilities Assistance and Bill of Rights Act of 1999

Provisions related to patient/provider protections and access to occupational therapy services

S 24 Health Care Assurance Act

Provisions related to standards for managed care plans and provider/patient protections

S 240 Patients' Bill of Rights Act of 1999

Provisions related to patient/provider protections and access to occupational therapy services

S 300 Patients' Bill of Rights Plus Act

Provisions related to standards for managed care plans and provider/patient protections

S 326 Patient's Bill of Rights; Personal Medical Information Access Act; Genetic Information Nondiscrimination in Health Insurance Act of 1999; Healthcare Research and Quality Act of 1999

Provisions related to coverage of occupational therapy services and support of self-sufficiency initiatives

S 331 Work Incentives Improvement Act

Provisions related to patient/provider protections and access to occupational therapy services

S 374 Promoting Responsible Managed Care Act of 1999

Provisions related to covered providers

S 464 Mental Health Juvenile Justice Act

Provisions related to covered providers

S 465 Mental Health Juvenile Justice Act

Provisions related to individuals with disabilities and services covered

S 538 Protect Children From Violence Act

Continuation of Attachment to Page 5, The American Occupational Therapy Association, Inc. §. HCR

All provisions related to patient/provider protections, access/availability of occupational therapy services

§ 6 Patients' Bill of Rights

Provisions related to availability and coverage of occupational therapy services.

§ 636 Children's Health Insurance Accountability Act of 1999

All provisions, especially covered providers/services

§ 796 Mental Health Equitable Treatment Act of 1999

Provisions related to individuals with disabilities and available services

§ 976 Youth Drug and Mental Health Services Act

The American Occupational Therapy  
Registrant Name Association, Inc. 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 INS (one per page)

16. Specific lobbying issues

See Attachment

17. House(s) of Congress and Federal agencies contacted  Check if None

U.S. House of Representatives  
U.S. Senate

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

| Name                 | Covered Official Position (if applicable) | New                      |
|----------------------|---|--------------------------|
| Kathryn M. Pontzer   |   | <input type="checkbox"/> |
| Christina A. Metzler |   | <input type="checkbox"/> |
| Frederick P. Somers  |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name and Title \_\_\_\_\_

## Attachment to Page 6

The American Occupational Therapy Association, Inc.

8. INS

Provisions related to patient/provider protections and access to occupational therapy services

HR 1133 Comprehensive Managed Care Health Reform Act of 1999

All provisions, especially covered providers/services

HR 1515 Mental Health and Substance Abuse Parity

Provisions related to occupational therapy services availability and coverage

HR 16 Program of National Health Insurance, Provision

Provisions related to availability and coverage of occupational therapy services.

HR 1661 Public Health Service Act, Amendment; Employee Retirement Income Security Act of 1974, Amendment

Provisions related to providers covered

HR 2043 Patient Right to Unrestricted Medical Advice Act of 1999

Provisions related to standards and protections for patients/providers, inclusion of occupational therapy practitioners

HR 2095 Employee Retirement Income Security Act of 1974, Amendment

All provisions

HR 216 Access to Quality Care Act

Provisions related to standards and protections of patients/providers, inclusion of occupational therapy providers

HR 2275 Employee Retirement Income Security Act

All provisions

HR 2723 Bipartisan Consensus Managed Care Improvement Act

Provisions related to patient/provider protections and access to occupational therapy services

HR 358 Patients' Bill of Rights Act of 1999

Provisions related to standards for managed care plans and provider/patient protections

HR 448 Patient Protection Act of 1999

Provisions related to standards for managed care plans and provider/patient protections

HR 719 Managed Care Reform Act of 1999

Provisions related to patient/provider protections and access to occupational therapy services

S 1256 Patients Bill of Rights

Provisions related to patient/provider protections and access to occupational therapy services

S 24 Health Care Assurance Act

Continuation of Attachment to Page 6, The American Occupational Therapy Assoc.,  
8. INS

Provisions related to standards for managed care plans and provider/patient  
protections

§ 240 Patients' Bill of Rights Act of 1999

Provisions related to patient/provider protections and access to occupational  
therapy services

§ 300 Patients' Bill of Rights Plus Act

Provisions related to standards for managed care plans and provider/patient  
protections

§ 326 Patient's Bill of Rights; Personal Medical Information Access  
Act; Genetic Information Nondiscrimination in Health Insurance  
Act of 1999; Healthcare Research and Quality Act of 1999

Provisions related to patient/provider protections and access to occupational  
therapy services

§ 374 Promoting Responsible Managed Care Act of 1999

All provisions related to patient/provider protections, access/availability of  
occupational therapy services

§ 6 Patients' Bill of Rights

Provisions related to availability and coverage of occupational therapys  
services.

§ 636 Children's Health Insurance Accountability Act of 1999

The American Occupational Therapy  
Registrant Name Association, Inc. 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 MED (one per page)

16. Specific lobbying issues

None this period

17. House(s) of Congress and Federal agencies contacted  Check if None

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

| Name                 | Covered Official Position (if applicable) | New                      |
|----------------------|---|--------------------------|
| Christina A. Metzler |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name and Title \_\_\_\_\_

The American Occupational Therapy  
Registrant Name Association, Inc. 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 MM (one per page)

16. Specific lobbying issues

See Attachment

17. House(s) of Congress and Federal agencies contacted  Check if None

U.S. House of Representatives  
U.S. Senate

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

| Name                 | Covered Official Position (if applicable) | New                      |
|----------------------|---|--------------------------|
| Christina A. Metzler |   | <input type="checkbox"/> |
| Kathryn M. Pontzer   |   | <input type="checkbox"/> |
| Frederick P. Somers  |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name and Title \_\_\_\_\_

## Attachment to Page 8

The American Occupational Therapy Association, Inc.

8. ~~MM~~

Provisions related to access to occupational therapy services  
 HR 131 Comprehensive Long-Term Care Act of 1999

Provisions related to availability and coverage of occupational therapy services  
 HR 1344 Triple-A Rural Health Improvement Act of 1999

All provisions, especially as relate to occupational therapy services  
 HR 1385 Reinstatement of the Medicare Rehabilitation Act

Provisions related to availability and coverage of occupational therapy services  
 HR 1543 Partial Hospitalization Services Integrity Act of 1999

All provisions  
 HR 1672 Smart IDEA Act of 1999

All provisions, especially those related to occupational therapy services  
 HR 1736 Medicare Rehabilitation Benefit Equity Act of 1999

All provisions, especially those related to occupational therapy services  
 HR 1837 Medicare Rehabilitation Benefit Improvement Act of 1999

Provisions related to occupational therapy providers  
 HR 1984 Elderly Protection Act

All provisions  
 HR 216 Access to Quality Care Act

Provisions related to occupational therapy services  
 HR 2229 Social Security Act, Amendment

All provisions  
 HR 2723 Bipartisan Consensus Managed Care Improvement Act

All provisions, especially as they relate to occupational therapy services and  
 coverage/payment  
 HR 3075 Medicare Balanced Budget Refinement Act of 1999

All provisions relating to provision of occupational therapy services and  
 rehabilitative services and coverage  
 HR 3426 Amendments to Social Security Act; References to BBA

All provisions, especially those related to occupational therapy services  
 HR 989 Hospital Length of Stay Act of 1999

Provisions related to occupational therapy services  
 S 1231 Medicare Fraud Prevention and Enforcement Act of 1999

All provisions, especially those related to occupational therapy services  
 S 265 Hospital Length of Stay Act of 1999

Continuation of Attachment to Page 8, The American Occupational Therapy Association, Inc. 8. MRM

All provisions, especially those related to occupational therapy services  
S 472 Medicare Rehabilitation Benefit Improvement Act of 1999

All provisions, especially those related to occupational therapy services  
S 794 Hospital Length of Stay Act of 1999

The American Occupational Therapy  
Registrant Name Association, Inc. 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

None this period

17. House(s) of Congress and Federal agencies contacted  Check if None

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

| Name                 | Covered Official Position (if applicable) | New                      |
|----------------------|---|--------------------------|
| Christina A. Metzler |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |
|                      |   | <input type="checkbox"/> |

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

Signature *Darlene C. Dennis* Date 2/14/2000  
Printed Name and Title Darlene C. Dennis, Political Action Administrator, AOTA

**Information Update Page - Complete ONLY where registration information has changed.**

20. Client new address

21. Client new principal place of business (if different from line 20)

City \_\_\_\_\_ State/Zip (or Country) \_\_\_\_\_

22. New general description of client's business or activities

**LOBBYIST UPDATE**

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

Kathryn M. Pontzer, Legislative Counsel

**ISSUE UPDATE**

24. General lobbying issues previously reported that **no longer** pertain

**AFFILIATED ORGANIZATIONS**

25. Add the following affiliated organization(s)

| Name | Address | Principal Place of Business<br>(city and state or country) |
|------|---------|--|
|      |         |  |

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

| Name | Address | Principal place of business<br>(city and state or country) | Amount of contribution<br>for lobbying activities | Ownership<br>percentage in<br>client |
|------|---------|--|---|--------------------------------------|
|      |         |  |   |                                      |

28. Name of each previously reported foreign entity that **no longer** owns, or controls, or is affiliated with the registrant, client or affiliated organization

Signature *Darlene C. Dennis* Date 2/14/2000

Printed Name and Title Darlene C. Dennis, Political Action Administrator, AOTA