

MINUTES  
OF THE MEETING OF  
THE EXECUTIVE COMMITTEE  
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS  
April 11, 2013

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, April 11, 2013, at 8:30 A.M. in the System's Springfield office at 2101 S. Veterans Parkway with videoconferencing in SERS Chicago Office.

Committee members present:

Loren Iglarsh, Chairperson  
Timothy Blair, Executive Secretary  
Lori Laidlaw, Vice Chairperson

Others Present:

Steve Bochenek, Attorney  
Michelle P. Clatfelter, Attorney  
Kathy Yemm, Manager, Claims Division  
Kerry Walker, Assistant Supervisor, Disability Section  
Dawn Blakeman, Recording Secretary

Minutes of the Previous Meeting

The minutes of the March 14, 2013 meeting of the Executive Committee were presented by Chairman Iglarsh for approval. Copies of the minutes were previously mailed to Committee members for review. There being no additions or corrections, on motion by Vice Chairperson Laidlaw seconded by Chairman Iglarsh and by unanimous vote, the minutes were approved as submitted.

Routine Claims & Denial Report

The Routine Claims and Denials Report for the month of March, 2013 were presented. Following review and discussion, the Routine Claims and Denials Report for the period of March, 2013, as prepared by staff was received by the Executive Committee.

Old Business

Brenda Russell Non-Occupational Disability  
Brenda Russell has requested and attended a personal hearing with the Executive Committee pursuant to the denial of disability benefits.

She explained she has additional medical information; however, she failed to bring it with her.

The Executive Committee agreed to have Ms. Russell provide the additional medical information to the Disability Assistant Supervisor for review.

The Committee agreed to defer this matter at this time in order to obtain and review the additional information.

Additional medical information was submitted which substantiates a disability condition.

Phillip J. Saupe Pension/Reciprocal

On June 1, 2012, Mr. Saupe retired under the Reciprocal Act with the State Employees' Retirement System (SERS) and State Universities Retirement System (SURS).

Based upon a review of the file and information submitted, the Executive Committee finds Phillip Saupe is receiving a retirement annuity as of June 1, 2012 and during the application process for his retirement annuity, he indicated he wanted to retire under the reciprocal option.

Mr. Saupe was initially paid \$5,883.76. After the reciprocal exchange was complete it was determined a proportional reduction was necessary because his combined benefits exceeded the 80% maximum. His benefit from SERS was reduced to \$5,491.01.

In a letter dated November 9, 2012, Mr. Saupe sent in a written request to appear before the Executive Committee to appeal the reduction of his SERS pension.

Mr. Phillip J. Saupe along with his friend, Mr. Bruce Bialorucki, appeared before the Committee during the December 6, 2012 meeting. A personal hearing was accomplished and a record of this hearing has been made a part of the member's file.

He stated he doesn't believe that he made any errors and that he should not be punished for our errors.

Following a review of the file and some discussion, the Committee has recommended that the appeal of Phillip J. Saupe be deferred so that the Supervisor of the Pension Section can contact the SURS office to verify that Mr. Saupe could change his retirement within the provisions of the law. He also wants to transfer creditable service to SERS under the provisions of SB65 providing the Police Funds of Benton and Mt. Vernon approve the repayment and transfer under the provisions of SB65.

**New Business**

James P. Stites Non-Occupational Disability

James P. Stites works for a state agency and a medical leave of absence was granted.

Mr. Stites' application for disability benefits was denied based upon the results of a review of medical information in his file.

Based upon a review of the file and information submitted, the Executive Committee finds the employee's job description and work location are as stated and that he was granted a medical leave of absence.

Medical information in file was reviewed by the System's medical consultant on January 31, 2013. Based upon this review, the conclusion was the information in file did not substantiate a disabling impairment.

Mr. Stites' claim for non-occupational disability benefits was denied due to medical information failing to substantiate a disability. Mr. Stites requested a personal hearing pursuant to the denial of disability benefits.

James P. Stites appeared before the Committee during the April 11, 2013 meeting. He was accompanied by his attorney, Mr. James P. Baker. A personal hearing was accomplished and a record of this hearing has been made a part of Mr. Stites' file.

Based on a review of the file and additional medical information submitted, Vice Chairperson Laidlaw moved approval of the appeal of the denial of non-occupational disability benefits for James P. Stites. Chairman Iglarsh seconded the motion.

Keith Anderson Occupational Disability/12 Months

Keith Anderson works for a state agency and a service connected leave of absence was granted.

Mr. Anderson's claim for disability benefits was denied due to failure to apply for occupational disability benefits within the proper time frame.

Based upon a review of the file and information submitted, the Committee finds Keith Anderson works for a state agency and a service connected leave of absence was granted.

The System did not receive the employee's application for disability benefits within the time limitation pursuant to occupational disability benefits as noted in 40 ILCS 5/14-123, therefore the application was denied.

Mr. Anderson requested a written appeal pursuant to the denial of disability benefits due to late filing. The appeal request indicates the reasons the employee failed to file on a timely basis.

Based on the facts of this case and information submitted, the Committee recommends approving Mr. Anderson's appeal for a waiver of the twelve month filing limitation.

Following a review of the file and some discussion, Vice Chairperson Laidlaw moved approval of the appeal of Keith Anderson for a waiver of the twelve month filing time limit for occupational disability benefits. Chairman Iglarsh seconded the motion and all were in favor.

Coty Murphy Non-Occupational Disability

Ms. Murphy works for a state agency and was granted a medical leave of absence on October 24, 2012.

Her claim for disability benefits was denied based on a review of medical documentation from treating medical sources.

Based upon a review of the file and information submitted, the Committee finds that Ms. Murphy works for a state agency and was granted a medical leave of absence.

Coty Murphy has requested an appeal pursuant to the denial of disability benefits.

Medical documentation in the employee's file was reviewed by the System's medical consultant on December 29, 2012 and again on February 3, 2013, and based on the information in the file. The medical consultant states "in his opinion the medical does not substantiate a disabling impairment". Therefore the request for disability was denied.

In a letter dated March 13, 2013, Ms. Coty Murphy requested a written appeal pursuant to the denial of disability benefits.

Medical documentation in the employee's file was again reviewed by the System's medical consultant on February 3, 2013 based on the medical information in the file. The medical consultant stated the medical does not substantiate a disabling impairment. Therefore the request for disability was denied.

Based on the facts of this case and additional medical information submitted, Chairman Iglarsh moved approval of the appeal of Coty Murphy for non-occupational disability. Executive Secretary Blair seconded the motion, and all were in favor

Judy K. Cunningham Reinstatement of Write Off

The account of Judy K. Cunningham became eligible for a write-off in June, 1996.

Contributions in the amount of \$324.44 and widow and survivors in the amount of \$40.44 and 20 months of creditable service were written off on June 25, 2006. Ms. Cunningham has contacted us regarding her account and eligibility for a pension under the Reciprocal Act.

The Service and Refunds Division is requesting the Executive Committee to approve the reinstatement of this account so that a future pension may be paid.

Following a review of the file and some discussion, Chairman Iglarsh moved approval of the appeal of Judy K. Cunningham request for reinstatement of her account. Executive Secretary Blair seconded the motion and all were in favor.

Jill Gordon Non-occupational Disability

Ms. Gordon's Attorney has requested a re-appeal of the denial of non-occupational disability.

However, it was noted Ms. Gordon is no longer a member, she took a refund of her contributions in October, 2012.

The refund application states "I hereby request a refund of contributions made by me or on my behalf as a member of the State Employees' Retirement System of Illinois as provided in Article 14 of the "Illinois Pension Code". *I understand by the acceptance of such refund, I forfeit all accrued rights and creditable service.*"

Therefore the request of Jill Gordon and her Attorney Steve Berg to re-appeal is denied.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:30A.M.

The next meeting of the Executive Committee is scheduled for Thursday May 9, 2013, in the Springfield office, with video conferencing in Chicago if needed.

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Loren Iglarsh  
Chairman

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Lori Laidlaw  
Vice Chairperson

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Timothy Blair  
Executive Secretary