

MINUTES  
OF THE MEETING OF  
THE EXECUTIVE COMMITTEE  
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS  
April 13, 2017

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, April 13, 2017 at 8:30 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members:

Loren Iglarsh, Chairman  
Jeremy Tad Hawk, Trustee  
Timothy Blair, Executive Secretary

Others Present:

Steve Bochenek, SERS Attorney  
Kathy Yemm, Manager, Claims Division  
Don Williams, Supervisor, Disability Section  
Cory Mitchell, Acting Supervisor, Pension and Death Section  
Jeff Houch, Assistant Executive Secretary  
Jessica Blood, Recording Secretary

Minutes of the Previous Meeting

The minutes of the March 9, 2017 meeting of the Executive Committee were presented by Chairperson Iglarsh for approval. Copies of the minutes were previously mailed to Committee members for review. There being no additions or corrections, on motion by Executive Secretary Blair, 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, 2017 was presented. Following review and discussion, the Routine Claims and Denials Report for the period of March, 2017, as prepared by staff, was reviewed and received by the Executive Committee.

## Old Business

James Shales – Denial of Temporary Benefits – Hearing scheduled for May 4, 2017

## New Business

Taylor Scott III – Appeal to Participate in the Social Security Offset Removal

Taylor Scott retired effective January 1, 2016. Mr. Scott did not choose the Social Security Offset removal option.

Mr. Scott is requesting to participate in the Social Security Offset removal and repay the amount that would have been withheld if he had chosen this option when he retired.

After review of the case, a motion was made by Executive Secretary Blair to approve Mr. Scott's appeal to participate in the Social Security Offset Removal, seconded by Chairman Iglarsh. All were in favor.

Robin Brinkmeier-Oblinger – Appeal to Repay Survivor Contribution Refund

Carl Oblinger retired effective September 1, 2004. Mr. Oblinger did not have an eligible survivor and received a survivor contribution refund of \$2,804.77.

Mr. Oblinger was married on March 23, 2005 and requested the cost to repay the survivor contribution refund in October, 2014. He did not repay the refund prior to his death on January 22, 2017. A \$500.00 death benefit is due to his named beneficiary.

Mr. Oblinger's wife, Robin, is requesting to repay the survivor contribution refund to establish a survivor annuity.

Based on the facts of the case and information submitted, a motion was made by Executive Secretary Blair to deny Ms. Brinkmeier-Oblinger's appeal to repay the survivor contribution refund, seconded by Chairman Iglarsh. All were in favor.

Donald Penelton – Waiver of Survivor Benefits

Sheila Penelton was an active state employee who died on October 31, 2016. She was survived by two children, a 36 year old daughter, Sheena Jackson, and a 20 year old son, Donald Penelton.

Donald Penelton has not been a full-time student. He is requesting to waive any possible future survivor benefits so a death benefit may be paid to the named beneficiary as an active member death with no survivors.

After some discussion a motion was made by Trustee Hawk to approve Mr. Penelton's request to waive the survivor benefit, seconded by Chairman Iglarsh. All were in favor.

### Austyn Brazell – Waiver of Survivor Benefits

Paul Brazell was an active state employee who died on October 4, 2015. He was survived by one child, a 20 year old son, Austyn Brazell.

Austyn Brazell has not been a full-time student. He is requesting to waive any possible future survivor benefits so a death benefit may be paid to the named beneficiary as an active member death with no survivors.

Following some discussion a motion was made by Chairman Iglarsh to approve Mr. Brazell's request to waive survivor benefits, seconded by Trustee Hawk. All were in favor.

### Liddell Payne – Occupational Disability 12 Month Waiver

Liddell Payne works as a Security Therapy Aide I for the State of Illinois Department of Human Services, Elgin Mental Health Center. She stopped working the first period, on January 14, 2015, due to an injury and began a service connected leave of absence on January 23, 2015.

Ms. Payne returned to work on March 17, 2015 and stopped work again 13 days later for a second time period beginning March 30, 2015. She began her service connected leave of absence on March 31, 2015 for the same injury, but returned to work again on April 27, 2016.

Though Ms. Payne was entitled to receive occupational benefits for the above mentioned time periods, since she received temporary total disability (TTD) benefits through the Illinois Workers' Compensation Commission (IWCC), she states that she was unaware of the process and her right to apply. She is asking the Executive Committee to waive the 12 month filing limitation.

After review of the information submitted a motion was made by Chairman Iglarsh to approve Ms. Payne's request to waive the 12 month filing limitation, seconded by Trustee Hawk. All were in favor.

### Jeanette King – Occupational Disability 12 Month Filing Waiver

Jeanette King works as a Communication Attendant for the Attorney General's Office. Ms. King last worked on December 14, 2015. She began a service connected leave on December 15, 2015 due to an injury. She returned to work on April 1, 2016.

Ms. King has requested a written appeal to the Executive Committee to have the 12 month filing limitation waived.

Based on the facts of the case a motion was made by Trustee Hawk to approve Ms. King's request to waive the 12 month filing limitation, seconded by Chairman Iglarsh. All were in favor.

### Jennifer Lee – Occupational Disability 12 Month Filing Limitation - Deferred

Jennifer Lee works as a Conservation Police Officer II for the Illinois Department of Natural Resources. She has two prior service connected leave of absences and has been paid TTD by Worker's Compensation for both of these absences.

The first leave of absence was for an injury occurring on January 19, 2014. She last worked on January 28, 2015 and began her service connected leave of absence on January 29, 2015 due to a medical issue. She received extended benefits through March 31, 2015. She began receiving TTD benefits April 1, 2015 and returned to work on April 20, 2015.

The second leave of absence was for the same injury occurring January 19, 2014. She last worked October 18, 2015 and began her service connected leave of absence on October 9, 2015 due to an injury. She began receiving TTD benefits from October 1, 2015 through October 15, 2016.

Ms. Lee was paid an occupational benefit by SERS for the October 16, 2016 through December 31, 2016 time period. She returned to work outside of the State of Illinois on January 1, 2017.

Ms. Lee is applying for occupational benefits for the two prior periods of disability (April 1-19, 2015) and (October 1, 2015-October 15, 2016). She is asking the Executive Committee to waive the 12 month filing period for both prior periods, as she was unaware of her eligibility to apply for disability until just recently, when she was placed on SERS occupational benefit October 16, 2016.

Following some discussion, a decision was made to defer the case in order to gather more information.

### Leon Jackson – Occupational Disability 12 Month Waiver

Leon Jackson works as a Collector for Tollway. Mr. Jackson last worked on January 24, 2015. He began a medical leave of absence on January 25, 2015 due to a medical issue. He returned to work on June 25, 2015.

Mr. Jackson has requested that the Executive Committee waive the 12 month filing limitation.

After some discussion a motion was made by Chairman Iglarsh to approve Mr. Jackson's request to waive the 12 month filing limitation, seconded by Trustee Hawk. All were in favor.

### Benjamin Soloff – Non-Occupational Disability 90 Day Waiver

Benjamin Soloff works as a Correctional Officer for Illinois Department of Corrections. He last worked on March 31, 2016. He began a medical leave of absence on April 13, 2016 due to an injury.

Mr. Soloff is requesting that the Executive Committee waive the 90 day filing limitation.

After review of the information submitted a motion was made by Chairman Iglarsh to approve Mr. Soloff's request to waive the 90 day filing limitation, seconded by Trustee Hawk. All were in favor.

#### Herdie Vinson Jr. – Non-Occupational Disability 90 Day Waiver

Herdie Vinson Jr. is appealing the denial of disability based on the 90 day rule. He was removed from payroll November 22, 2016. His 90 days expired February 19, 2017. The application was received by SERS March 13, 2017. SERS sent agency forms March 7, 2017. The medical documentation was received March 13, 2017. He has not returned to work.

Mr. Vinson Jr. is requesting that the Executive Committee waive the 90 day filing limitation.

After review of the case a motion was made by Trustee Hawk to approve Mr. Vinson's request to waive the 90 day filing limitation, seconded by Chairman Iglarsh. All were in favor.

#### Gloria Pierce – Non-Occupational Disability 90 Day Waiver

Gloria Pierce is appealing the denial of disability based on the 90 day rule. She was removed from payroll April 18, 2016. Her 90 days expired July 16, 2016. The application was received by SERS March 20, 2017. SERS sent agency forms January 23, 2017. The medical documentation was received March 20, 2017. Ms. Pierce returned to work July 7, 2016.

Ms. Pierce is requesting that the Executive Committee waive the 90 day filing limitation.

After some discussion a motion was made by Trustee Hawk to approve Ms. Pierce's request to waive the 90 day filing limitation, seconded by Executive Secretary Blair. All were in favor.

#### Dushay Walker – Non-Occupational Disability Leave Denied - Deferred

Dushay Walker works as a Security Therapy Aide I for the Illinois Department of Human Services, Elgin Mental Health Center. She stopped working on July 29, 2016 and began a medical leave of absence on September 17, 2016 due to a medical issue. She returned to work on November 21, 2016.

Ms. Walker's application was reviewed by SERS Medical Consultant #063 on February 24, 2017 and again on March 29, 2017. Both times it was determined that she was not considered disabled from performing her job duties.

Ms. Walker is requesting that the Executive Committee overturn the denial of her disability application.

After some discussion a decision was made to defer Ms. Walker's case.

### Margaret Johnson – Appeal to Revoke Level Income

Margaret Johnson retired effective December 1, 2005. She chose the level income option for age 66 years and 0 months. The level income option increased her pension by \$232.17 per month.

Effective April 1, 2017, her pension was reduced by \$757.00 per month as this was the amount the member provided SERS at the time of her retirement that she would be eligible to receive from Social Security.

Ms. Johnson is asking to have the level income option removed from her pension as she did not understand how this option worked and feels it was not properly explained to her.

After reviewing the facts of the case a motion was made by Executive Secretary Blair to deny Ms. Johnson's appeal to revoke the level income option, seconded by Trustee Hawk. All were in favor.

### Karen Vaccaro – Non-Occupational Disability 90 Day Waiver

Karen Vaccaro is appealing the denial of disability based on the 90 day rule. She was removed from payroll August 29, 2015. Her 90 days expired November 25, 2015. The application was received by SERS March 23, 2017. SERS Sent agency forms February 14, 2017. The medical documentation was received March 23, 2017. Ms. Vaccaro returned to work October 15, 2015

Ms. Vaccaro is requesting that the Executive Committee waive the 90 day filing limitation.

After reviewing the facts of the case a motion was made by Trustee Hawk to approve Ms. Vaccaro's request to waive the 90 day filing limitation, seconded by Chairman Iglarsh. All were in favor.

### SERS Collection Policy

SERS Attorney Bochenek presented the Executive Committee with recommended changes to the current SERS Collection Policy. After discussion a motion was made by Chairman Iglarsh to adopt Attorney Bochenek's suggested changes and to add the statement "The net amount does not include voluntary reductions" to the third paragraph of the policy, seconded by Trustee Hawk. All were in favor.

### Gainful Employment Policy Discussion

Kathy Yemm presented before the Executive Committee the issue of a member who exceeded the gainful employment limits while disabled but not receiving any benefits from SERS and whether that member is eligible for disability benefits now that she is no longer gainfully employed but is still disabled.

After discussion and review of the case, the decision was made to retroactively pay the member disability benefits, with the exception of the periods during which she was gainfully employed and then pay her future occupational disability benefits beginning April 1, 2017.

The member would not be considered as having violated the SERS gainful employment policy.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:45 a.m.

The next meeting of the Executive Committee is scheduled for May 11, 2017, in the Springfield office, with video conferencing in Chicago.

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Loren Iglarsh, Chairman

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Jeremy Tad Hawk, Trustee

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Timothy Blair, Executive Secretary