

MINUTES  
OF THE MEETING OF  
THE EXECUTIVE COMMITTEE  
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS  
February 5, 2015

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, February 5, 2015 at 8:30 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members Present:

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

Others Present:

Steve Bochenek, Attorney  
Kathy Yemm, Claims Manager  
Don Williams, Supervisor, Disability Section  
Kerry Walker, Disability Section  
Michael Noblet, Supervisor, Pension & Death Section  
Cory Mitchell, Pension and Death Section  
Joseph Maggio, Manager, Service and Refunds Division  
Peter Paluzzi (claimant), with attorney (Francine Wright)  
Leonard Kolesar (claimant's survivor)  
Patricia Belk, SERS Chicago office  
David Morris, SERS Board Trustee  
Jennifer Staley, Recording Secretary

Minutes of the Previous Meeting

The minutes of the January 8, 2015 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 Executive Secretary Blair and seconded by Vice Chairperson Laidlaw, and by unanimous vote, the minutes were approved as submitted.

Routine Claims & Denial Report

The Routine Claims and Denials Report for the month of January, 2015 was presented. Following review and discussion, the Routine Claims and Denials Report for the period of January, 2015, as prepared by staff, was reviewed by the Executive Committee. There being no additions or corrections, on motion by Executive Secretary Blair and seconded by Vice Chairperson Laidlaw, and by unanimous vote, the Routine Claims and Denials Report was approved as submitted.

## Old Business

### Peter Paluzzi – Reappeal of Overpayment

Peter Paluzzi works as a Highway Maintainer for the Department of Transportation, District 2. He last worked on February 13, 2008. Mr. Paluzzi has an overpayment that he appealed to the Executive Committee on October 7, 2014. His appeal was denied.

Peter Paluzzi, with the help of his attorney Francine White, is reappealing the claimed overpayment of benefits. After hearing the basis of their appeal, the case was referred to SERS' attorney, Steve Bochenek, for a recommendation to be presented at the March 12, 2015 meeting.

### Leonard Kolesar - Denial Survivor Benefits – Request for Re-appeal

Simeon Fleming retired effective March 3, 2005 at which time he did not have a qualified survivor. He was paid a refund of widow survivor contributions on April 22, 2005 totaling \$3,302.80. He entered into a civil union with Leonard Kolesar on June 8, 2011. Mr. Kolesar asserts that Simeon was advised that if they joined in the civil union, Mr. Kolesar would be eligible for a monthly benefit, but they were not aware that the widow survivor contributions needed to be repaid. The widow survivor refund was \$3,302.80. Mr. Kolesar was sent a survivor application packet in error on October 21, 2014. When the error was discovered, he was sent a letter dated November 5, 2014 explaining the situation and denying survivor benefits.

At the December 11, 2014 Executive Committee meeting, the case was reviewed. Mr. Kolesar was asking that in order to receive monthly benefits as a survivor he be allowed to repay the widow/survivor refund from monthly benefits to be paid by the System.

After some discussion and based on the statutory language regarding the repayment of the refund, Executive Secretary Blair motioned to deny the appeal of Mr. Fleming, seconded by Vice Chairperson Laidaw. All were in favor.

At the January 8, 2015 Executive Committee meeting, the supervisor of the Pension Section stated that Mr. Kolesar is requesting that he be allowed to have a personal appeal of the previous denial of survivor benefits.

After some discussion, Executive Secretary Blair made a motion that we allow Mr. Kolesar's re-appeal of the denial of benefits for the February 2015 meeting, seconded by Chairman Iglarsh. All were in favor.

Mr. Kolesar was present at the February 5, 2015 meeting to reappeal the denial of benefits. After hearing the basis of his appeal, the case was referred to SERS' attorney, Steve Bochenek, for a recommendation to be presented at the March 12, 2015 meeting.

## New Business

### Randall Bowen – Occupational Disability – 12 Month Rule

Randall Bowen works as a Support Worker II for the Illinois School for the Deaf. He began a service connected leave of absence on February 3, 2009 to present. He has and is receiving workers' compensation TTD benefits during this time period.

Mr. Bowen's occupational disability claim has been denied as he did not apply for SERS occupational disability within the 12 month filing period. An application was mailed to him on October 24, 2014. He returned his application on November 14, 2014.

Mr. Bowen is requesting that the 12 month rule be waived for the above-mentioned time period.

After some discussion, Chairman Iglarsh moved for approval of the appeal of the 12 month filing limitation, seconded by Executive Secretary Blair. All were in favor.

### Heath Hooks – Repayment of Refund

This account became eligible for a write-off in June, 2006. Contributions in the amount of \$999.00, widow/survivors' in the amount of \$124.80, and 8 months of creditable service were written off on June 23, 2006. Mr. Hooks has requested to repay a refund under the Reciprocal Act.

The Service & Refunds Division is requesting the Executive Committee to approve the reinstatement of this account.

After some discussion, Chairman Iglarsh moved for approval of reinstatement of the account, seconded by Vice Chairperson Laidlaw. All were in favor.

### Shontell Mitchell – Review Repayment Payment Plan

Shontell Mitchell was receiving disability benefits from the State Employees' Retirement System. While on disability her agency discovered that she was working outside the State of Illinois; however, Ms. Mitchell was signing certification statements from SERS that she was *not* working, resulting in an overpayment of approximately \$40,000. Criminal charges were filed against Shontell Mitchell. Member's attorney called SERS asking for a repayment plan with member paying some money up front. Upon the advice of the Executive Committee, SERS will call her attorney and work with the State Attorney's Office on this case to determine the action to take in collecting the overpayment.

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 Thursday, March 12, 2015, in the Springfield office, with video conferencing in Chicago.

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Loren Iglarsh  
Chairman

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Lori Laidlaw  
Vice Chairperson

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Timothy Blair  
Executive Secretary