

MINUTES
OF THE MEETING OF
THE EXECUTIVE COMMITTEE
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS

January 12, 2017

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, January 12, 2017 at 8:30 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members:

David Morris, Vice Chairperson
Timothy Blair, Executive Secretary

Others Present:

Steve Bochenek, SERS Attorney
Jeff Houch, Assistant Executive Secretary
Kathy Yemm, Claims Manager
Don Williams, Supervisor, Disability Section
Cory Mitchell, Pension and Death Section
Jennifer Staley, Recording Secretary
Loren Iglarsh

Minutes of the Previous Meeting

The minutes of the December 8, 2016 meeting of the Executive Committee were presented by Vice Chairman Morris 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 Morris, and by unanimous vote, the minutes were approved as submitted.

Routine Claims & Denial Report

The Routine Claims and Denials Report for the month of December, 2016 was presented. Following review and discussion, the Routine Claims and Denials Report for the period of December, 2016, as prepared by staff, was reviewed and received by the Executive Committee.

Old Business

Kimberly Hannold – Appealing denial of temporary disability benefits

Kimberly Hannold works as a Juvenile Justice Specialist for the Illinois Department of Juvenile Justice, Illinois Youth Center in St. Charles. She last worked on January 28, 2016 and began a medical leave of absence on February 8, 2016.

Medical records were requested and received from her physician on September 30, 2016. Her file was reviewed by SRS Medical Consultant #70 on October 22, 2016. It was of the medical consultant's opinion that Ms. Hannold retains the ability to perform all the duties of her job as delineated, based on the medical evidence in file as of that date. Ms. Hannold is requesting a person appeal for the denial of temporary disability benefits for the timeframe of January 28, 2016 to the present.

Ms. Hannold appeared before the Executive Committee for a personal hearing on December 8, 2016. Subsequent to the hearing an updated medical review was requested of SRS medical consultant #70. After reviewing the facts of the case and the updated medical, the Executive Committee agreed to defer the case and refer to SRS attorney for recommendation.

New Business

Chinyere Omenazu – Occupational Disability 12 Month Waiver

Ms. Omenazu works as a caseworker for the Illinois Department of Human Services, Human Capitol Development. She is requesting the Executive Committee waive two prior periods so that she may file for Occupational disability benefits for her August 27, 2009 injury.

The first time period is for 2009-2010. Her last day worked was August 27, 2009. She began a medical leave of absence effective February 5, 2010. She returned to work for two weeks in March of 2011. She was paid TTD February 5, 2010 through December 31, 2010.

The second time period is for 2011. Her last day worked was March 18, 2011. She began a medical leave of absence effective March 24, 2011. She returned to work in February of 2012. She was paid TTD October 16, 2011 through December 31, 2011.

Ms. Omenazu is appealing the 12 month filing limitation.

After discussion of the case, a motion was made by Executive Secretary Blair to approve Ms. Omenazu's request to waive the 12 month filing limitation, seconded by Vice Chairperson Morris. All were in favor.

Nikki Woolverton – Occupational Disability 12 Month Waiver

Nikki Woolverton works as a Social Service Program Planner II for the Public Health Department. Her last day worked was May 8, 2015 and she began a service connected leave of absence on May 16, 2015 due to an injury. She returned to work August 17, 2015. She was paid TTD.

Ms. Woolverton is appealing the one year filing limitation.

After some discussion it was decided that, due to Vice Chairperson Morris's association with Ms. Woolverton, the case would be deferred to next month's Executive Committee meeting.

Dave Oleson – Occupational Disability 12 Month Waiver

Dave Oleson worked as a Correctional Officer for the State of Illinois Department of Corrections. He stopped working on January 7, 2008 and began a medical leave of absence on January 15, 2008. He has never returned to work.

This member is entitled to Occupational disability benefits since the time he was placed on TTD benefits through the IWCC; the member states that he was unaware of the 12 month filing rule and would like the Executive Committee to waive the filing limitation.

Dave Oleson is appealing the denial of his disability benefits. He is requesting that the 12 month rule be waived. He has been receiving TTD benefits since January 15, 2008.

After some discussion, a motion was made by Executive Secretary Blair to deny Mr. Oleson's request to waive the 12 month filing limitation, seconded by Vice Chairperson Morris. All were in favor.

Kraig Kotter – Waiver of 90 Day Filing Period

Kraig Kotter works as a plumber for the Department of Corrections. He last worked on August 16, 2016. He began a medical leave of absence on August 18, 2016.

Mr. Kotter was released from the hospital on October 26, 2016. Due to the extent of his sickness, he was unable to send in his non-occupational packet within 90 days. He did manage to send it in at 104 days. Mr. Kotter is asking the 90 day filing period be waived.

After reviewing the case, a motion was made by Vice Chairperson Morris to approve Mr. Kotter's request to waive the 90 day filing period, seconded by Executive Secretary Blair. All were in favor.

Aldora Lomax – Request to Reinstate Write-Off

This account became eligible for write-off in June, 2008. Contributions in the amount of \$9,657.07 and 172.25 months of creditable service were written off in June, 2005.

Ms. Lomax has supplied SERS with a new address and proper identification.

Ms. Lomax is requesting her account be reinstated so she can begin receiving a pension benefit.

After discussing the case a motion was made by Vice Chairperson Morris to approve Ms. Lomax's request to reinstate the write-off, seconded by Executive Secretary Blair. All were in favor.

Pamela Greer and Rachel Greer – Appeal to Split Death Benefit

Bruce Greer retired on July 1, 2012 and died on December 28, 2014. A death benefit is payable in the amount of \$2,439.15.

The beneficiary form is unclear as to whether Mr. Greer wanted Pamela Greer or Rachel Greer as the primary beneficiary and who he wanted as the contingent beneficiary.

Pamela Greer and Rachel Greer have both completed a waiver of benefits to disclaim the whole portion and agree to split the amount equally.

After review of the case a motion was made by Executive Secretary Blair to approve Pamela and Rachel Greer's request to split the death benefit, seconded by Vice Chairperson Morris. All were in favor.

Dave Pfeiffer – Non-Occupational Disability Reduced Payment of Overpayment

Dave Pfeiffer is appealing his monthly repayment plan amount. Mr. Pfeiffer indicated he would submit a list of his monthly expenses.

Mr. Pfeiffer received non-occupational disability benefits from SERS from January 1, 2013 through January 31, 2016. He was awarded a retroactive benefit from Social Security beginning June 1, 2013. Due to the Social Security Award, his disability benefit was overpaid by \$53,408.00.

Mr. Pfeiffer retired on February 1, 2016. The first pension payment was offset by \$3,284.92 (\$1,100.00 retroactive payment plan plus \$2,184.92 widow/survivor refund). The outstanding balance of the overpayment is now \$50,123.08.

A five year repayment plan would require a monthly payment of \$835.39. SERS will continue to deduct \$100.00 per month from Mr. Pfeiffer's monthly retirement annuity while under appeal.

Mr. Pfeiffer is currently receiving a monthly Social Security benefit of \$1,728.50 (less \$127.00 Part B Medicare) in addition to a monthly gross pension of \$861.57 (net \$794.21).

The 5 year (60 months) repayment plan amount of \$835.39 per month exceeds his monthly net benefit. A 6 year (72 months) repayment plan would be \$696.15 per month. A 7 year (84 months) repayment plan would be \$596.70 per month.

After review of the case a motion was made by Executive Secretary Blair to deny Mr. Pfeiffer's request to reduce the monthly payment of his overpayment, seconded by Vice Chairperson Morris. All were in favor.

Richard Lewis – Appeal to Revoke Social Security Offset Removal

Richard Lewis retired reciprocally with Municipal Employees' Annuity and Benefit Fund of Chicago (MEABF) on December 1, 2011. He elected the Social Security offset removal. This election reduced his pension by \$47.44 per month.

Mr. Lewis returned to state employment on July 5, 2012. He is re-retiring effective December 1, 2016. On his recent pension application, Mr. Lewis chose not to reduce his pension for the Social Security offset removal.

Mr. Lewis' spouse can receive more from Social Security on her own record than on his because he worked for 23 years with MEAB which does not contribute to Social Security.

Mr. Lewis is requesting that the Social Security offset removal be revoked from his original pension. By doing this, his unreduced first pension can be combined with his second pension.

After discussing the case a motion was made by Executive Secretary Blair to approve Mr. Lewis's request to revoke the Social Security offset removal with no reimbursement for prior amounts withheld, seconded by Vice Chairperson Morris. All were in favor.

There being no further business to be brought before the Committee, the meeting was adjourned at 9:47 a.m.

The next meeting of the Executive Committee is scheduled for February 9, 2017, in the Springfield office, with video conferencing in Chicago.

David Morris, Vice Chairperson

Timothy Blair, Executive Secretary