

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

March 14, 2019

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, March 14, 2019 at 8:45 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:

Jeff Houch, Assistant Executive Secretary  
Christine Self, Attorney  
Kathy Yemm, Manager, Claims Division  
Karen Brown, Disability Supervisor, Claims Division  
Jennifer Staley, Recording Secretary

Minutes of the Previous Meeting

The minutes of the February 14, 2019 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, seconded by Chairman Iglarsh and by unanimous vote, the minutes were approved as submitted.

Routine Claims Report

The Routine Claims Report for the month of February 2019 was presented. Following review and discussion, the Routine Claims Report for the period of February 2019, as prepared by staff, was received by the Executive Committee.

## Old Business

None

## New Business

### Jason L. Emmett – Nonocc – Requesting Waiver of 90 Day Filing Limitation

Jason Emmett works as an Office Director for the Illinois Department of Natural Resources. He stopped working on December 21, 2017, was last paid on April 10, 2018, and began a medical leave of absence on April 11, 2018. He has never returned to work.

SERS was notified of his disability on May 25, 2018 after a nonoccupational disability packet was requested. SERS received his application on August 15, 2018; however, it was not received within 90 days of the day he was last paid by his agency. Because his application was not received prior to the 90-day filing rule, he did not receive a favorable onset of his benefits. SERS began his nonoccupational benefit effective August 15, 2018, the day his application was received.

Mr. Emmett's request for an earlier effective date was denied in accordance with Chapter 40 Pensions 5/14-124(5).

After review and discussion, Trustee Hawk moved to approve Mr. Emmett's request to waive the 90 day filing limitation, seconded by Chairman Iglarsh. All were in favor.

### June Daymon – Nonocc – Requesting Waiver of 90 Day Filing Limitation

June Daymon is appealing the denial of disability based on the 90 day filing rule. She was removed from the payroll August 30, 2018. Her 90 days expired November 27, 2018. She came in for a packet December 21, 2018. Her application was received February 7, 2019 and her medical was received February 7, 2019. She has not returned to work.

The member's request was denied in accordance with Chapter 40 Pensions 5/14-124(5).

After review and discussion, Trustee Hawk moved to approve Ms. Daymon's request to waive the 90 day filing limitation, seconded by Chairman Iglarsh. All were in favor.

### Fabiola Echevarria – Nonocc – Requesting Waiver of 90 Day Filing Limitation

Fabiola Echevarria works as an Assistant Local Office Associate for the Department of Human Services. Ms. Echevarria last worked on August 6, 2018. Ms. Echevarria began a medical leave of absence on August 21, 2018 and returned to work on October 9, 2018.

The member's request was denied in accordance with Chapter 40 Pensions 5/14-124(5).

After review and discussion, Chairman Iglarsh moved to approve Ms. Echevarria's request to waive the 90 day filing limitation, seconded by Executive Secretary Blair. All were in favor.

### Jennifer Brammer – Occ Dis – Requesting Waiver of 12 Month Filing Limitation

Jennifer Brammer works as a correctional officer for IDOC. She was injured on February 14, 2015 and last worked on December 20, 2015. She began a medical leave of absence on December 21, 2015 due to a work-related injury. She returned to work on October 22, 2017.

She has requested a written appeal to the Executive Committee so that the 12 month filing limitation can be waived. She was paid TTD for this time period.

The member's request was denied in accordance with Chapter 40 Pensions 5/14-123(a).

After review and discussion, Trustee Hawk moved to approve Ms. Brammer's request to waive the 12 month filing limitation, seconded by Chairman Iglarsh. All were in favor.

### Devin Stokes – Appealing Overpayment on Survivor Contribution Repayment

Devin Stokes retired May 1, 2015. He completed the dependent information on his retirement application as single with no applicable dependents. Mr. Stokes has twins who were born in 2007 and were 8 years old at the time of his retirement. They are currently 12 years old. It was discovered Mr. Stokes had received this refund and was not eligible for the funds. An overpayment letter was mailed to him on November 29, 2018 with instructions on how to submit an appeal.

Cory Mitchell spoke with the member on December 11, 2018. The member stated he did not want to repay the survivor contribution refund as he had life insurance and the children would not need a survivor benefit upon his death. He was told to submit an appeal.

An appeal had not been received so a follow-up letter was mailed to Mr. Stokes February 6, 2019 advising him that half of his gross (\$4,867.64) would be applied toward the overpayment.

Mr. Stokes is paying the remaining balance of the survivor contribution refund with a rollover from Deferred Compensation.

Devin Stokes is appealing the overpayment as he thought the money was due to him because he was unmarried.

After review and discussion, a motion was made by Trustee Hawk to deny Mr. Stokes' request to appeal the overpayment. Chairman Iglarsh seconded the motion. All were in favor.

#### Carol Knowles – Appeal to Waive Interest

Carol Knowles retired September 1, 2018 and returned to State employment on January 17, 2019. Immediately upon reentry, she requested to repay her pension payments and the billing letter was mailed to the member on February 19, 2019. On February 26, 2019, Ms. Knowles provided her repayment to the System. Ms. Knowles requested that the interest charge of \$161.21 be waived as she was timely in requesting the repayment cost and completed the repayment within 2 business days upon receiving the billing.

Chairman Iglarsh abstained from the decision, and after review of the facts and circumstances, Trustee Hawk moved to approve Ms. Knowles' request to waive the interest. Executive Secretary Blair seconded the motion, and the motion passed unanimously.

#### Joseph Lombardi – Re-Appeal for Repayment of Refunds

Joseph Lombardi requested to repay refunds he received from the State Employees' Retirement System (SERS). In order to repay a refund, an employee or member is required to have accumulated at least 24 months of service credit with SERS or a reciprocal system subsequent to the date of the refund. Since Mr. Lombardi is not currently an employee or member of SERS or a reciprocal system, and has not accumulated at least 24 months of service credit subsequent to the date of the refund, his request was denied.

After review and discussion, Chairman Iglarsh moved to deny Mr. Lombardi's request to repay the refunds, seconded by Executive Secretary Blair. All were in favor.

#### Write-off Reinstatement – Request to Reinstate Member Accounts That Have Returned to Active State Payroll

A group of six member accounts were written-off in a prior fiscal year. Since then the members have returned to an active state payroll.

The Accounting Division is requesting the Executive Committee to reinstate the SERS member accounts that were written off so that their written off prior service can be added to their current active service.

After review and discussion, Trustee Hawk moved to approve the reinstatement of member accounts, seconded by Executive Secretary Blair. All were in favor.

**Add-on:**

Kiera Massey – Nonocc -Requesting Waiver of 90 Day Filing Limitation

Kiera Massey works as a Mental Health Tech I for Ann Kiley Center. Ms. Massey last worked on July 25, 2018. She went on a medical leave of absence July 29, 2018. She has since returned to work.

The member's request was denied in accordance with Chapter 40 Pensions 5/14-124(5).

After review and discussion, a motion was made by Trustee Hawk to approve Ms. Massey's request to waive the 90 day filing limitation, seconded by Chairman Iglarsh. All were in favor.

There being no further business to be brought before the Committee, the meeting was adjourned at 9:40 a.m.

The next meeting of the Executive Committee is scheduled for April 11, 2019, 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