

MINUTES  
OF THE MEETING OF  
THE EXECUTIVE COMMITTEE  
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS  
November 8, 2012

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, November 8, 2012, at 8:30 A.M. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee members present:

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

Others Present:

Michelle P. Clatfelter, Attorney  
Kathy Yemm, Manager, Claims Division  
Chris Silver, Supervisor, Disability Section  
Michael Noblet, Supervisor, Pension & Death Section  
Kerry Walker, Assistant Supervisor, Disability Section  
Cory Mitchelle, Assistant Supervisor, Pension & Death Section  
Steven Martin, Informational meeting  
Mr. & Mrs. Ronald Martin, Parents of Steven Martin  
Dawn Blakeman, Recording Secretary

Minutes of the Previous Meeting

The minutes of the October 11, 2012 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 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 October, 2012 were presented for approval. Following review and discussion, Chairman Iglarsh moved acceptance of the Routine Claims and Denials Report for the period of October, 2012. On motion by Chairman Iglarsh seconded by Vice Chairperson Laidlaw and by unanimous vote, the Routine Claims and Denials were approved as submitted.

Old Business

Robert Ruiz

Pension

Robert Ruiz requested a personal hearing with the Executive Committee in a letter dated November 19, 2009, regarding the reciprocal agreement be cancelled so he can still collect his pension benefits from the County Employees' Annuity & Benefit Fund of Chicago pension fund.

Mr. Ruiz through a telephone conversation in December, 2011 with Michael Noblet, Supervisor of the Pension and Death Division has requested another hearing continuance. Accordingly, this case continues to be deferred.

Vicki Chambliss

Non-occupational Disability

Vicki Chambliss works for a state agency and a medical leave of absence was granted.

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

Medical data was obtained from sources listed in the employee's file and then reviewed by the System's medical consultant. Based on the information in Vicki Chambliss' file, a disabling condition was not documented. Therefore, the request for disability was denied. Vicki Chambliss requested an appeal pursuant to the denial of disability benefits.

Based on the facts of this case and information submitted, the Committee recommended deferring the appeal of Vicki Chambliss until additional information could be obtained and reviewed by the system's medical consultant.

Ms. Chambliss requested her case be deferred until the November meeting.

In a letter dated October 10, 2012, Mr. L. James Hanson, Attorney for Ms. Chambliss sent in additional medical information. The entire file was reviewed by the System's medical consultant who determined that the medical information failed to substantiate a disabling condition.

After discussion the Committee recommended denial of the appeal of Ms. Vicki Chambliss for non-occupational disability benefits. Executive Secretary Blair moved that the appeal be denied. Vice Chairman Laidlaw seconded the motion, and all were in favor.

Michelle Flowers

Occupational Disability

Michelle Flowers works for a state agency and a medical leave of absence was granted.

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

On June 10, 2012 the System's medical consultant reviewed the entire file. The review indicated the medical information in the file failed to substantiate a disability.

Pursuant to the denial of disability benefits, Michelle Flowers requested and attended a personal hearing with the Executive Committee.

Ms. Flowers explained the job duty statement was incorrect and that she would get more medical information.

The Committee agreed to have Ms. Flowers complete a new job duty statement. SERS also agreed to have her supervisor do the same. The information would then be sent to the Disability Supervisor for review. Ms. Flowers also agreed to send additional medical records for review.

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

### New Business

Angela Dame Occupational Disability/12months

Angela Dame works for a state agency and a service connected leave of absence was granted.

Ms. Dame's claim for prior 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 Angela Dame 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 until 06/15/2012. Since the application was received beyond the twelve month filing limitation as noted in 40 ILCS 5/14-123, the application was denied.

Ms. Dame requested a written appeal pursuant to the denial of disability benefits due to late filing. Information was received with the appeal request which lists 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 Ms. Angela Dame's appeal for a waiver of the twelve month filing limitation.

Following a review of the file and some discussion, Chairman Iglarsh moved approval of the appeal of Angela Dame for a waiver of the 12 month filing limitation for occupational disability benefits. Vice Chairman Laidlaw seconded the motion and all were in favor.

Emilio Mendez Occupational Disability/12months

Emilio Mendez works for a state agency and a service connected leave of absence was granted.

Mr. Mendez'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 Emilio Mendez 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 until 10/01/2012. Since the application was received beyond the twelve month filing limitation as noted in 40 ILCS 5/14-123, the application was denied.

Mr. Emilio Mendez requested a written appeal pursuant to the denial of disability benefits due to late filing. Information was received with the appeal request which listed 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 Emilio Mendez's appeal for a waiver of the twelve month filing limitation.

Following a review of the file and some discussion, Chairman Iglarsh moved approval of the appeal of Emilio Mendez for a waiver of the 12 month filing limitation for occupational disability benefits. Vice Chairman Laidlaw seconded the motion and all were in favor.

Vicki Danyus Occupational Disability/12months

Vicki Danyus works for a state agency and a service connected leave of absence was granted.

Ms. Vicki Danyus' 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 Vicki Danyus 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 until 9/04/2012. Since the application was received beyond the twelve month filing limitation as noted in 40 ILCS 5/14-123, the application was denied.

Ms. Danyus requested a written appeal pursuant to the denial of disability benefits due to late filing. Information was received with the appeal request which lists 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 Ms. Vicki Danyus' appeal for a waiver of the twelve month filing limitation.

Following a review of the file and some discussion, Chairman Iglarsh moved approval of the appeal of Vicki Danyus for a waiver of the 12 month filing limitation for occupational disability benefits. Vice Chairman Laidlaw seconded the motion and all were in favor.

Mark McShane Reinstatement

Mr. McShane's account became eligible for write-off in June, 2007. Contributions in the amount of \$16,427.18 and widow and survivor in the amount of \$2,052.66 and 96.25 months of creditable service were written off in June, 2007. Mr. McShane has contacted us regarding his account and eligibility for a pension.

The Pension & Death Section is requesting the Executive Committee to approve the reinstatement of this account so that a pension may be paid.

Following a review of the file and some discussion, Executive Secretary Blair moved approval of the appeal to reinstate Mark McShane's account and Vice Chairperson Laidlaw seconded the motion, and all were in favor.

Susan Hughes Widow/Survivor Refund Request

Based upon a review of the file and information submitted, the Executive Committee finds Ms. Susan Hughes has been receiving a retirement annuity since September 1, 2011, and during the application process for her retirement annuity she indicated she had a dependent child which was a full time student.

Ms. Hughes telephoned SERS in August 2012 stating she recently discovered her daughter was not a full time student when she retired. She is appealing for a refund of her widow/survivors contributions.

Staff investigated by calling Lincoln Land Community College. It was discovered that Ms. Hughes' daughter had dropped back her hours to less than full time but not until November 2011. Therefore her daughter was a full time student on the effective date of her pension.

Following a review of the file and some discussion, Vice Chairman Laidlaw moved that the appeal of Susan Hughes be denied. Chairman Iglarsh seconded the motion, and all were in favor.

Ms. Hughes is requesting a re-appeal at the November Executive Committee meeting. She is requesting the Committee re-review her request.

After a review of the file and some discussion, Vice Chairman Laidlaw moved that the re-appeal of Susan Hughes be denied. Chairman Iglarsh seconded the motion, and all were in favor.

Jean A. Rechner (deceased) Beneficiary Policy Verification

Ms. Rechner passed away on September 21, 2012. She was a retired member at the time of her death.

SERS cannot locate a beneficiary form; however, there are two named beneficiaries (her children) listed on the database.

Mr. Noblet, Supervisor of the Pension & Death Section is requesting that the Executive Committee approve him to send forms to the beneficiaries noted on the database even though the actual hard copy form cannot be located. The Committee advised staff that in this specific case the information on the database may be used since there is not a conflicting beneficiary form on file.

Following a review of the file and some discussion on the existing policy, the Committee has agreed to defer this matter at this time in order to obtain confirmation for approval from our attorney.

Gwyn Gurgens Pension

In a letter dated November 5, 2012 Ms. Gwyn Gurgens is requesting a personal hearing to request her retirement annuity begin October 1, 2012.

Based upon a review of the file and information submitted, the Executive Committee finds Ms. Gurgens has requested her pension to start at the earliest possible date.

Prior to application for her retirement annuity, Ms. Gurgens received two unaudited retirement annuity estimates. These estimates indicated Ms. Gurgens qualified for a retirement annuity under the "Rule of 85."

Ms. Gurgens came back in the office in July and completed the application process.

She then signed resignation papers for September 30, 2012 to start her retirement on October 1, 2012.

Gwyn Gurgens called the pension department the end of October wanting to know when her fist check would arrive. She was told at that time her pension would not start until November 1, 2012, that she was .50 months short to retire October 1, 2012.

Ms. Gwyn Gurgens is requesting the committee approve her pension to start October 1, 2012.

Following a review of the file and some discussion, Vice Chairperson Laidlaw moved to approve the appeal of Gwyn Gurgens, Chairperson Iglarsh seconded the motion and all were in favor.

Michele McCarthy

Reinstatement of Account

This account became eligible for write-off in June, 2008. Contributions in the amount of \$12,684.93 and widow and survivor in the amount of \$1,584.46 and 109 months of creditable service were written off on June 27, 2008. Ms. McCarthy has contacted us with a change of address and has requested a statement of account.

The Service and Refund Division is requesting the Executive Committee approve the reinstatement of this account.

Following a review of the file and some discussion, Chairman Iglarsh moved approval of the appeal to reinstate Michele McCarthy's account and Vice Chairperson Laidlaw seconded the motion, and all were in favor.

Steven Martin

SSA Overpayment

Steven Martin and his parents Mr. & Mrs. Ronald D. Martin attended an informational meeting at the request of the Executive Committee. The purpose was to try and help Mr. Martin understand the reason why he has a disability overpayment.

The Committee finds Mr. Martin worked for a state agency and was granted a medical leave of absence.

Mr. Martin received a retroactive disability benefit from the Social Security Administration (SSA) which created an overpayment of non-occupational disability benefits being paid by SERS.

Upon receipt of the information regarding Mr. Martin's SSA disability benefits award, he was contacted regarding the overpayment of non-occupational disability benefits. This overpayment was in accordance with 40 ILCS 5/14-125 and Section 1540.90 of the Illinois Administrative Code which indicate non-occupational disability benefits paid by the System are reduced by the SSA disability benefit.

The purpose of the meeting was to discuss the disability benefit amounts paid to him by SERS and SSA, and understand how SERS calculated the amount of the overpayment. SERS will provide Mr. Martin with a detailed breakdown of his payments.

Steve Martin requested coming back for more information after the first of the year.

Chairman Iglarsh agreed to have Mr. Martin return for more information after the first of the year.

There being no further business to be brought before the Committee, the meeting was adjourned at 12:00PM. The next meeting of the Executive Committee is scheduled for Thursday December 6, 2012, 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