

MINUTES  
OF THE MEETING OF  
THE EXECUTIVE COMMITTEE  
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS  
November 12, 2015

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, November 12, 2015 at 8:30 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members:

Loren Iglarsh, Chairperson  
David Morris, Vice Chairperson  
Timothy Blair, Executive Secretary

Others Present:

Stephen Bochenek, Attorney  
Jeff Houch, Assistant Executive Secretary  
Kathy Yemm, Claims Manager  
Don Williams, Supervisor, Disability Section  
Cory Mitchelle, Pension and Death Section  
Joe Maggio, Service and Refunds Manager  
Jennifer Staley, Recording Secretary

Minutes of the Previous Meeting

The minutes of the October 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 Chairman Iglarsh and seconded by Executive Secretary Blair, 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, 2015 was presented. Following review and discussion, the Routine Claims and Denials Report for the period of October, 2015, as prepared by staff, was reviewed and accepted by the Executive Committee.

## Old Business

### Brenda Sawyer – Temporary Disability - Deferred

Ms. Sawyer is employed by the Secretary of State as an Administrative Assistant III Case Worker. Ms. Sawyer last worked June 10, 2014 and began a medical leave of absence June 16, 2014. She was expected to be off work for 8 weeks but at this time she is still off work.

Ms. Sawyer filed a workers' compensation claim which was denied on June 20, 2014. She has applied for temporary disability benefits through SERS.

Ms. Sawyer had an allergic reaction at work on June 10, 2014. Ms. Sawyer was referred to Phillip Wuertz, LCSW, whom she has been seeing since September 2, 2014.

Ms. Sawyer's file was reviewed by Medical Consultant #70. Overall, the history demonstrates that she is an insightful and compliant person. There has been improvement since the initial event, and a good prognosis is anticipated. In my opinion the illness is not severe, and she is not considered to be disabled from performing the duties of her job.

Ms. Sawyer was seen by Louis B. Cady, M.D. It is his opinion she has continuously, since June 14, 2014, been unable to perform her position or, in fact, be engaged in any active employment. Given the circumstances, she is not able to perform the duties assigned to her at this time.

Medical Consultant #70 reviewed Dr. Cady's report and opined Ms. Sawyer has been diagnosed with an unusual illness, which may have work implications, but the other symptoms do not prevent the performance of work.

Ms. Sawyer was evaluated on March 31, 2015 by M.A. Park, M.D., at Mayo Clinic. Medical Consultant #70 reviewed Dr. Park's medical records and opined the latest medical data does not support the presence of a disability.

Ms. Brenda Sawyer was present at the May 14, 2015 meeting and gave an in-depth accounting of her illness. She stated she is still undergoing medical testing and depending on the outcome, will see if her condition could be treated or controlled.

After hearing the basis of the appeal at the May 14<sup>th</sup> Executive Committee, Attorney Reid-Peterson advised she will pass on the information to Attorney Bochenek.

Ms. Sawyer's agency was contacted regarding her working conditions to see if anything could be altered to accommodate her situation in the work environment. At the present time, nothing would be done.

After some discussion by the Executive Committee at its June, 2015 meeting, the case was referred to Attorney Bochenek for a recommendation to present at the July Executive Committee meeting.

At the July, 2015 Executive Committee meeting the Committee determined that since a medical basis, as well as a psychiatric basis, was being asserted as the reason for the disability, the Committee needed to refer this matter to one of the medical consultants for the System for their review and opinion.

At the August and September, 2015 Executive Committee meetings it was noted that no additional medical information had been submitted from the medical consultant. The case was deferred until such information is received.

At the October, 2015 meeting it was noted that there was new medical information on Ms. Sawyer. SERS provided the system attorney with the new medical information for review and referred the matter to the system's attorney for recommendation at the November, 2015 meeting.

The morning of the November Executive Committee meeting the disability supervisor received new information on Ms. Sawyer. The case will be deferred until all new information can be reviewed.

### Mark Mason – SSA Overpayment

Mark Mason is a security guard for the Secretary of State Police. Due to an illness, Mr. Mason had been at Mayo Clinic from December, 2014 through August, 2015.

Mr. Mason received social security disability effective November 24, 2014, creating an overpayment of nonoccupational disability benefits from November 24, 2014 through July 31, 2015 in the amount of \$10,728.03.

Mr. Mason doesn't believe any offset should be taken for his social security disability. He is appealing the overpayment and the requirement to pay it back.

Mr. Mason made a personal appeal at the September 10, 2015 meeting in Springfield. After hearing his reason for the appeal, the Executive Committee advised Mr. Mason to make an appointment with an advisor to see what his benefit options are and then work with him on the best scenario for him to repay the money.

Prior to the October 8<sup>th</sup>, 2015 Executive Committee meeting, Cory Mitchell, of the Pension Section, gave Mr. Mason three different benefit options and explained how the overpayment repayment process would work for each scenario. Mr. Mason has until November 4, 2015 to decide which option he will take. The case is deferred until an option is chosen.

At the November 12, 2015 Executive Committee meeting, Cory Mitchell of the Pension Section stated that she had gone over the benefit choices with Mr. Mason and he has not decided on any options at this time and still wants his overpayment to be waived. The case will be referred to Steve Bochenek, the system's attorney, for a recommendation.

## New Business

### Dennis Connor – Social Security offset reduction removed

Dennis Connor began receiving a retirement annuity effective January 1, 2009. Mr. Connor elected the social security offset removal in May 2009 when this option became available, reducing his pension by \$98.26 per month.

Mr. Connor's wife was a teacher and did not pay in to social security. Due to the Government Pension Offset, she is not eligible to receive any money from social security as a widow, making the social security offset removal unnecessary.

Mr. Connor is asking for the social security offset removal to be taken off of his pension.

After some discussion, a motion was made by Executive Secretary Blair to approve the request to take off the social security offset removal, seconded by Chairman Iglarsh. All were in favor.

### Rita Meyrick – Waiver of Death Benefits – Member, David Bartels

Rita Meyrick, the alternate payee of David Bartels, is requesting a waiver of death benefits.

David Bartels retired on June 1, 2011 and died on July 3, 2015. A death benefit is payable in the amount of \$500.00.

Mr. Bartels listed one beneficiary, his son Joshua Bartels. Rita Meyrick is eligible for a portion of the death benefit due to a Qualified Illinois Domestic Relations Order (QILDRO).

Rita Meyrick has signed a waiver of benefits for her portion of the death benefit so their son, Joshua Bartels, can receive the entire amount.

After some discussion, a motion was made by Executive Secretary Blair to deny the waiver of death benefits due to court order, seconded by Vice Chairperson Morris. All were in favor.

### Nancy Mech-Homerding – Optional Service Credit Purchase

Nancy Mech-Homerding has requested a written appeal with the Executive Committee. She is requesting that she be allowed to purchase 19 months of optional service credit even though she retired effective September 1, 2015 with the Illinois Municipal Retirement Fund (IMRF).

Michael Noblet of the Pension Section contacted IMRF and they indicated that she would have to appeal to them to have the effective date of her pension remain September 1, 2015 so as to not have an overpayment.

After reviewing the case, Chairman Iglarsh made a motion to approve her request to purchase the optional service credit, seconded by Vice Chairperson Morris. The System will bill her for the amount due as of August, 2015 and give her 30 days to make the payment. All were in favor.

#### Phyllis Wilder - Gainful Employment

Phyllis Wilder exceeded the earnings limit in the 3<sup>rd</sup> and 4<sup>th</sup> quarter of 2014. She exceeded the earnings limitation by \$4,095.77 in the 3<sup>rd</sup> quarter of 2014 and \$5,741.02 in the 4<sup>th</sup> quarter of 2014, for a total of \$9,836.80. Staff received direction at the October 2015 Executive Committee to request full payment within 30 days of notice. The Executive Committee also directed Claims to send a second Gainful Employment letter along with the Disability Earnings Agreement.

Ms. Wilder has requested a \$1,000.00 a month payback schedule. She is currently recovering from surgery performed in July 2015.

After some discussion, a motion was made by Chairman Iglarsh to approve a \$1,000.00 a month payback schedule for Ms. Wilder, seconded by Executive Secretary Blair. All were in favor.

#### Dennis Raucci – Occupational Disability Benefits

Dennis Raucci works as an Internal Security Investigator at DHS. He began a service connected leave on February 19, 2009. He was injured at work which required surgery. He was paid workers compensation benefits from February 19, 2009 through May 3, 2009.

He has requested a written appeal to the Executive Committee so the 12 month filing limitation can be waived. He claims there was a miscalculation for his retirement date and he was unaware he had not received credit for the time period he was off for his occupational disability.

After some discussion, a motion was made by Chairman Iglarsh to approve the 12 month filing limitation, seconded by Executive Secretary Blair. All were in favor.

#### Circuit Court

Amended Complaint of Margaret Bonczyk, David Sharp, and Terry Hart - Executive Secretary Blair informed the Committee of a decision at the 7<sup>th</sup> Circuit Court that prohibits SERS from reducing the annuity for any retiree based upon P.A. 98-1117 until a final order of the court in this cause.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:00 a.m.

The next meeting of the Executive Committee is scheduled for December 10, 2015 in the Springfield office, with video conferencing in Chicago.

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Loren Iglarsh, Chairman

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David Morris, Vice Chairperson

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Timothy Blair, Executive Secretary