



2101 S. Veterans Parkway
P. O. Box 19255
Springfield, IL 62794-9255
217-785-7444

The Informer

The newsletter for survivors of the State Employees' Retirement System of Illinois

 [srs.illinois.gov](https://www.facebook.com/srs.illinois.gov)

JANUARY 2020



Keep your Member Services contact information up to date to receive the latest news, announcements or deadlines by email, letter or call.

Your benefit statement

Enclosed with this Informer is your current benefit statement. This statement contains detailed information about your SERS benefits.

If you have questions about your statement, call us at 217-785-7444.

5 Reasons to use your Member ID instead of SSN

Did you know you have a SERS Member ID? Each member is assigned one. You can find your member ID number on your statement or on the Member Services website.

According to [credit.com](https://www.credit.com), identity thieves have more access to you with your Social Security number than you may realize.

Identity thieves can use your SSN to:

- 1. Open financial accounts.** The single most important bit of personal information a bank or financial institution needs to open an account is your Social Security number. The damage caused from an unpaid loan or credit card can wreak havoc on your credit score, and unfortunately, it may take a while to recover.
- 2. Get medical care.** A person who falsifies your medical record by receiving treatment under your Social Security number can cause much more than financial damage. Many health care providers use your medical history as a base for future treatments. If someone else's information is mixed in the file, the results could be deadly.
- 3. File a tax return.** We are in the midst of tax season, so this should be on everyone's radar. The sooner you file your taxes, the less likely this is a possibility, however if your return is rejected as a duplicate, that's a sign your ID was stolen.
- 4. Commit crimes.** If an offender gives your Social Security number in an arresting record, you're now tied to the criminal history.
- 5. Steal your benefits.** Your Social Security number can be used to file for unemployment or Social Security benefits, giving criminals access to the money you may need later.



Tax Information

1099-R

In January, the Office of the Comptroller mailed IRS Form 1099-R for 2019 SERS benefit payments to all annuitants and survivors. These payments must be reported on IRS Form 1040 under the Income section (Pensions and annuities).

W2GI+

If you carry non-IRS dependent(s) on your state health/dental insurance, you should receive a Form W2GI+ from the Comptroller's office. Under federal tax law, the premium paid by the state must be added to your annual gross income if a covered dependent does not qualify as your tax dependent because it is subject to federal income tax.

The Form W2GI+ is also issued for all annuitants who carry a group term life insurance policy of \$50,000 or more through the state.

Form W2GI+ information is reported on IRS Form 1040 under the Other Taxes section (Health care: individual responsibility). Refer to IRS Publication 15-B for more information.

Federal income tax withholding

You may have noticed a slight change in the amount of federal tax deducted from your SERS benefit payment due to revised federal withholding tables that went into effect on January 1, 2020.

If you need to change the amount of your federal tax withholding, you must submit a new W-4P to SERS. The W-4P is available at [srs.illinois.gov](https://www.srs.illinois.gov), under the Forms link. The new W-4P may be submitted at any time throughout the year.

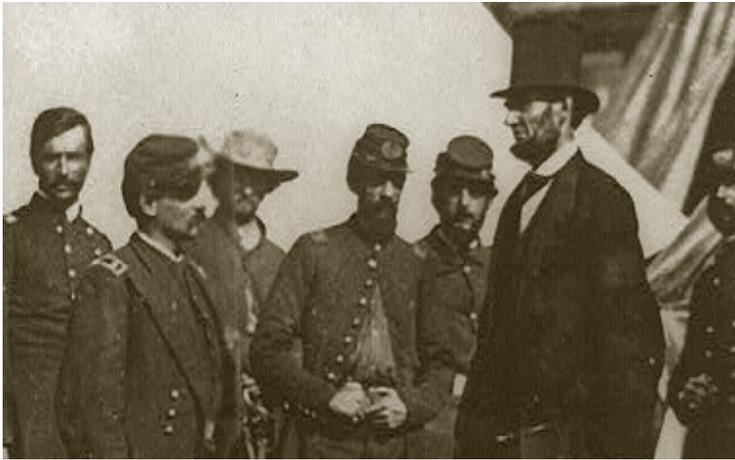
If you need to have additional tax withheld for other income, such as interest, dividends, capital gains, rents, alimony, taxable Social Security benefits, etc., you can submit a new W-4P to SERS at any time.

You should contact a qualified tax advisor or an IRS representative at 800-829-1040 with questions about your taxes, including withholdings.

You can now opt out of paper statements

Did you know that mail theft is one of the most common ways identity theft or fraud can happen to you? On the Member Services website, you can opt out of receiving your SERS annual benefit statement in the mail. You will still have access to current and prior years' statements through the secure website and you will continue to receive other SERS correspondence in the mail. Opting out of paper statements decreases the risk of your personal information falling into the wrong hands. Paperless statements help the retirement system to reduce its carbon footprint and save money in printing and postage costs, which can be better used to pay your retirement benefits!

Visit srs.illinois.gov to create a Member Services online account and opt out of paper statements. There are many benefits to registering and using the SRS Member Services website. On this site, you can access benefit information, download forms, view publications and print a customized income verification letter. If you need technical support in accessing your account, please call the SRS Help Desk at (217) 782-4202.



MyBenefits Website Address Change

If you access your insurance information on the MyBenefits website, you no longer need to include the www before MyBenefits.illinois.gov. While you may still be able to access the site with the www prefix with some search engines, you may want to clear out your computer cache history and save the new web address as **MyBenefits.illinois.gov**.



Moved recently? Update your address.

Updating your address is easy. Fill out the Change of Information Form 501 and mail it to us or email it to sers@srs.illinois.gov.

You can find Form 501 on our website under the Forms link or on the Member Services website.

Visit us online

Did you know you could access a copy of all publications on our website? This includes the newsletters, handbooks and brochures. You can also find helpful information regarding your insurance, any news about upcoming legislation, survivor benefit information and much more. Check us out at srs.illinois.gov.



CMS to Conduct Dependent Eligibility Verification Audit (DEVA)

We have been notified by the Group Insurance Division of CMS that a third-party vendor, HMS Employer Solutions, has been hired to conduct an audit to confirm dependents currently enrolled on your health insurance are still eligible. This audit is a federal and state requirement to ensure member compliance with adding eligible dependents. This will not include natural child dependents who were previously verified during the 2015 audit.

The DEVA audit will be divided into three phases:

Phase 1: Retirees and survivors not covered by Medicare (Jan. 27 – Mar. 20; failure to recertify terminations effective 4/1/20)

Phase 2: Active employees (Mar. 3 – Apr. 25; failure to recertify terminations effective 5/1/20)

Phase 3: Retirees and survivors covered by a Medicare Advantage Plan (Jul. 28 – Sept. 24; failure to recertify terminations effective 10/1/20)

If you are contacted by HMS Employer Solutions, you will be required to comply in order to keep your eligible dependents from being terminated. Questions regarding the audit must be directed to HMS Employer Solutions at 855-424-0849.