

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

April 11, 2024

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, April 11, 2024, at 8:45 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members Present:

Marvin Becker, Chairperson (via Videoconference)  
David Morris, Vice-Chairperson  
Timothy Blair, Executive Secretary

Others Present:

Jeff Houch, Associate Executive Secretary  
Samantha Goetz, General Counsel  
Jessica Blood, Recording Secretary  
Aaron Evans, Attorney, Sorling Northrup  
Michelle Billhorn-Hartford, Claimant (via Videoconference)

Motion to Allow Remote Participation

Executive Secretary Blair moved to allow Chairperson Becker to participate in the meeting remotely. The motion was seconded by Vice-Chairperson Morris and Chairperson Becker was allowed to participate via videoconference.

Minutes of the Previous Meeting

The minutes of the Executive Committee's meeting on March 14, 2024, were presented by Chairperson Becker for approval. Copies of the minutes were previously emailed to Committee members for review. Executive Secretary Blair moved to approve the minutes as submitted. The motion was seconded by Vice-Chairperson Morris and passed unanimously.

Routine Claims Report

The Routine Claims Report for March 2024 was presented. Following a brief discussion, the Routine Claims Report for March 2024 as prepared by staff was received by the Committee.

## Old Business

### Sarah Jahn – Request to Lower SSA Overpayment – Recommendation

Sarah Jahn worked for the Department of Insurance. She started a nonoccupational disability benefit with SERS in April 2021. In January 2024, SERS was notified that Ms. Jahn was approved for Social Security disability benefits beginning January 1, 2022.

SERS must offset Ms. Jahn's benefit for every month she also received an SSA disability benefit. The overpayment was from January 1, 2022, through December 31, 2023, a total of 24 months.

Ms. Jahn is appealing the calculation of her overpayment. She states her backpay check from SSA only covered from January 2, 2022, through October 31, 2023, and that SERS should have only calculated an overpayment of 22 months.

By the time SERS was notified of the SSA award, Ms. Jahn would have received monthly payments from SSA for November and December 2023. SERS had also paid her for November and December 2023 without the SSA offset, so the calculation of 24 months is correct.

Ms. Jahn is requesting in her appeal for the calculation of the overpayment to be figured on only 22 months. In addition, she is requesting that SERS reduce the amount of the final overpayment due to her financial hardship.

After hearing Ms. Jahn present her appeal at their March 2024 meeting, the Committee decided to review Ms. Jahn's payment history from SSA and refer her case to external council for a recommendation.

Attorney Evans presented Recommendation No. 2024-4, to deny Ms. Jahn's appeal. After review and some discussion, Vice-Chairperson Morris moved to adopt Recommendation No. 2024-4. The motion was seconded by Executive Secretary Blair and passed unanimously.

### Ronald Faltin – Appeal Termination of Nonoccupational Disability Benefit and Overpayment of Benefits – Exceeded Earnings Limitation – Deferred

Ronald Faltin began receiving nonoccupational disability benefits from SERS effective December 2, 2021. During the 2nd quarter of 2023, Mr. Faltin exceeded the gainful activity earnings limitation by \$372. On August 23, 2023 (during the 3rd quarter of 2023) he signed an agreement, paid the excess earnings to SERS, and resumed receiving nonoccupational disability benefits through November of 2023.

Mr. Faltin's payments were stopped effective December 1, 2023 because it was discovered that he exceeded the gainful activity earnings limitation for the 3rd Quarter of 2023 by \$1,118.55.

Title 80, Section 1540.85 b) of the Illinois Administrative Code provides that everything paid by SERS to Mr. Faltin after September 1, 2023 was an overpayment. His true overpayment is \$6,204.96.

Mr. Faltin is appealing the overpayment and termination of his benefits. He has requested a written hearing.

After discussing the facts of Mr. Faltin's appeal at their March 2024 meeting, the Committee decided to defer a decision pending further research into Mr. Faltin's overpayment and agency earnings limitation policy.

After reviewing additional information pertaining to the case, the Committee decided to again defer a decision pending research into the cumulative total of Mr. Faltin's overpayment and options for repayment.

### New Business

#### Michelle Billhorn-Hartford – Request to Reappeal Denial of Nonoccupational Disability Benefits

On April 13, 2023, the Executive Committee unanimously denied Michelle Billhorn-Hartford's appeal. Ms. Billhorn-Hartford is requesting a reappeal of that denial and has provided new information. SERS staff has reviewed these medical documents and contends such evidence does not qualify her for nonoccupational disability benefits.

Most of those documents are "after visit" summaries and pages of the testing that's been ordered, without the results, and copies of all her doctors' appointments. Additionally, there is very little in her actual medical records that would be sufficient to support her being disabled all this time. The records support that she is seeing a mental health therapist, but there are no further records associated with that dynamic.

The records also suggest that she had surgery during this time, but she supplied no records of the surgery or any follow-up visits. SERS staff concludes that such records do not warrant additional review by the SERS physician network, nor do they substantiate eligibility for nonoccupational disability benefits.

After determining that Ms. Billhorn-Hartford did not submit additional documentation sufficient to support her claim, no member moved to grant her a reappeal.

#### Leo Coleman – Appeal to Receive Refund of Survivor's Contributions

Leo Coleman retired effective December 1, 2023. He did not elect to receive a refund of the survivor's contributions. 40 ILCS 5/14-130(c) provides that a member with no eligible survivors may elect such refund "on the date of application."

Mr. Coleman is appealing to the committee to receive such refund after retirement.

After discussing the facts of the case, Chairperson Becker moved to deny Mr. Coleman's appeal. The motion was seconded by Executive Secretary Blair and passed unanimously.

#### Lynn Chapman – Request to Change Retirement Date to December 1, 2023

Lynn Chapman elected to begin her retirement benefit effective December 1, 2023. The cost to purchase her 6-month qualifying period was issued to Ms. Chapman on October 13, 2023. Shortly thereafter, Ms. Chapman elected to purchase this service in installments over a 24-month period, which began December 1, 2023. She completed payments on December 1, 2023 and January 1, 2024.

In January 2024, Ms. Chapman noticed that her retirement date had changed to December 1, 2025, due to entering the installment plan. Section 14-104 of the Pension Code provides that all service purchases must be completed before the retirement benefit effective date, so her retirement date was changed to the month immediately following when she was scheduled to complete the purchase in full, see 40 ILCS 5/14-104. In March of 2024, Ms. Chapman issued payment to SERS to complete the service purchase, and SERS changed her retirement date to April 1, 2024.

Ms. Chapman is appealing to the Committee to change her retirement date back to December 1, 2023, as she contends SERS failed to inform her of this outcome.

Jeff Houch recused himself from input on the case due to his personal knowledge of Ms. Chapman.

After discussing the facts of the case, Executive Secretary Blair moved to deny Ms. Chapman's appeal and offer the option to refund her service credit purchase and return her retirement date to December 1, 2023, or keep the purchased service credit and retain the April 1, 2024 retirement date. The motion was seconded by Vice-Chairperson Morris and passed unanimously.

#### Anita Parker – Appeal Denial of Nonoccupational Disability Benefits

Ms. Parker works as a Correctional Officer for the Illinois Department of Corrections. She last worked March 20, 2023. She began a medical leave of absence March 21, 2023 due to chronic medical conditions.

Her file was sent to MMRO for medical review. They determined that her medical records did not support a mental or physical impairment that incapacitated her from performing her job duties.

Ms. Parker submitted additional medical documentation for her claim. This was sent to MMRO to be considered and they returned an addendum to the original report, which still denied her claim.

Ms. Parker is requesting a written appeal regarding the denial of her claim. She states her doctor returned her to work with restrictions and her agency required her to request reasonable accommodations. Ms. Parker completed the reasonable accommodation paperwork, and her request was denied. Since she was denied, the agency has refused to let her return to her job with her restrictions.

After reviewing the information provided, Executive Secretary Blair moved to deny Ms. Parker's appeal. The motion was seconded by Vice-Chairperson Morris and passed unanimously.

Elia Sall – Request to Reappeal Overpayment of Occupational Disability Benefits

On October 10, 2023, the Executive Committee unanimously denied Ms. Sall's appeal of her overpayment of occupational disability benefits.

Ms. Sall is requesting a reappeal of that denial and has provided additional documentation.

After determining that Ms. Sall did not provide additional documentation sufficient to support her claim, no member moved to grant her a reappeal.

Tameka Hawkins-Floyd – Request to Reappeal Suspension of Disability Benefits – Failure to Repay Gainful Employment Earnings

On March 14, 2024, the Executive Committee unanimously denied Ms. Hawkins-Floyd's appeal to resume disability payments and waive the repayment of excess earnings component of Title 80, Section 1540.85 b) 2) B) of the Illinois Administrative Code.

Ms. Hawkins-Floyd is requesting a reappeal of that denial.

After determining that Ms. Hawkins-Floyd did not submit additional documentation sufficient to support her claim, no member moved to grant her a reappeal.

Sandy Brown – Request to Reappeal Denial of Occupational Disability Benefits

On October 12, 2023, the Executive Committee unanimously denied Sandy Brown's appeal of her denial of occupational disability benefits.

Ms. Brown is requesting a reappeal of that denial and has provided new information. SERS staff and MMRO have reviewed these medical documents and contend such evidence does not qualify her for nonoccupational disability benefits.

After determining that Ms. Brown did not submit additional documentation sufficient to support her claim, no member moved to grant her a reappeal.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:09 a.m.

The next meeting of the Executive Committee is scheduled for May 9, 2024, in the System's Springfield office.

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Marvin Becker, Chairperson

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David Morris, Vice-Chairperson

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Timothy Blair, Executive Secretary