

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

December 11, 2025

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, December 11, 2025, at 8:45 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members Present:

Marvin Becker, Chairperson  
Arnold Black, 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  
Roxanne Casey, Claimant

Minutes of the Previous Meeting

Chairperson Becker presented the minutes of the Executive Committee's meeting on November 13, 2025, for approval. Copies of the minutes were previously emailed to Committee members for review. Chairperson Becker moved to approve the minutes as submitted. The motion was seconded by Vice-Chairperson Black and passed unanimously.

Routine Claims Report

The Routine Claims Report for November 2025 was presented. Following a brief discussion, the Routine Claims Report for November 2025, as prepared by staff, was received by the Committee.

Old Business

Stephanie DeLong – Appeal Suspension of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – Recommendation

Stephanie DeLong has been on disability since October 2021 for disabling conditions. Ms. DeLong moved to Tennessee in 2022, and she and her husband opened a restaurant, while also owning a restaurant in Pontiac, Illinois. Ms. DeLong's earnings

exceeded the System's calendar limitations during the 4th quarter of 2021 and 2nd quarter of 2022 from the Pontiac, Illinois restaurant. In August 2022, Ms. DeLong signed a disability earnings agreement, agreeing to reimburse the overpayment and understanding that going over the System's quarterly limitations a second time shall be considered gainful employment which would necessitate termination of benefits. Ms. DeLong has also applied for and been denied SSA disability.

Ms. DeLong's certification of disability benefits does note that she is self-employed while on SERS disability. In September 2025, it was determined through Ms. DeLong's tax returns that she exceeded the System's quarterly limitations a second time. Her 2024 return lists gross receipts from the Tennessee restaurant of \$1,564,614. Ms. DeLong's business showed a net profit of just over \$19,000 this year. The Pontiac, Illinois restaurant closed in October 2024.

Ms. DeLong is requesting a personal hearing to appeal against the gainful employment determination and states that she has no income from any other employer, nor is she a W-2 employee. She states the income she receives is from her deceased husband's pension and money she had to take out of deferred compensation.

After hearing Ms. DeLong present her case at their November 2025 meeting, the Committee referred to external counsel for a recommendation.

Attorney Evans presented Recommendation No. 2025-11, to deny Ms. DeLong's appeal. Following some discussion, Executive Secretary Blair moved to adopt Recommendation No. 2025-11. The motion was seconded by Vice-Chairperson Black and passed unanimously.

#### Micah Jones – Appeal for Conversion to Occupational Disability Benefit and Continuation of Benefits – Personal Hearing via Teleconference – Recommendation

Micah Jones works for the Illinois Department of Corrections as a Correctional Officer. He filed a Workers' Compensation (WC) claim for exposure to toxic chemicals last working on August 18, 2024. He claims to have multiple disabling conditions.

Mr. Jones' WC claim was denied, so he could only apply for a temporary disability benefit from SERS. Mr. Jones has not yet settled his WC claim. It is noted that he is supposed to have a hearing sometime in November. Mr. Jones' temporary benefit is slated to be terminated December 31, 2025 due to his half-time ceasing.

Mr. Jones is appealing against the termination of benefits in December, stating that his disabling conditions are work related and should not have ever been considered temporary or nonoccupational. His termination letter from SERS indicated that his "nonoccupational" benefit would be ceasing, but he's in fact on a temporary benefit.

Mr. Jones is requesting a personal hearing via teleconference. He is asking for reconsideration and reclassification of his disability status as Occupational Disability in accordance with Section 14-123 of the Illinois Pension Code, immediate continuation of

benefits without interruption, and correction of any errors or delays that have caused financial hardship due to administrative inaction.

Following Mr. Jones' presentation of his appeal at their 2025 meeting, the Committee referred to external counsel for a recommendation.

Attorney Evans presented Recommendation No. 2025-12, to deny Mr. Jones' appeal. Chairperson Becker moved to adopt Recommendation No. 2025-12 and Executive Secretary Blair seconded the motion, which passed unanimously.

#### William Helm – Felony Forfeiture of Pension Benefits

William Helm was a member of SERS while working as a Technical Manager V for the Illinois Department of Transportation (IDOT) from June 1, 2004 to February 3, 2014. He retired from SERS in 2020 and had been receiving a benefit until it was suspended for this conviction.

According to the records of the United States District Court for the Northern District of Illinois, Mr. Helm was charged with and subsequently pleaded guilty to one count of bribery (18 U.S.C. § 666(a)(2) (2012) and one count of filing a false tax return (26 U.S.C. § 7206(1) (2012)) that occurred between July 2018 and November 2018. The court sentenced Mr. Helm to 18 months of imprisonment and one year of supervised release on each count, all to run concurrently, and ordered Helm to pay \$9,318.00 in restitution.

At their November 2025 meeting, the committee discussed the details of his conviction, his State service, and the various "tests" used to determine if a felony conviction is connected to a member's service. Following that discussion, the Committee deferred a decision pending additional research.

Samantha Goetz, SERS' General Counsel, presented the Committee with additional details regarding Mr. Helm's state employment. Following a discussion regarding the information presented and determining that Mr. Helm's conviction was not related to State government position, Executive Secretary Blair moved to reinstate his pension benefits retroactively to the date of suspension. The motion was seconded by Vice-Chairperson Black and passed unanimously.

#### New Business

#### Roxanne Casey – Appeal Overpayment of Temporary Disability Benefits – Personal Hearing via Teleconference – 9:00 a.m.

Roxanne Casey has been on SERS' temporary disability benefit since November 2023. SERS was notified in October that Ms. Casey was approved for Social Security disability benefits, with an entitlement date of January 2025.

An overpayment of SERS benefits was set up from January 2025, through September

2025.

Ms. Casey is requesting a telephone appeal against the overpayment of benefits. She stated she thought the money owed to SERS should have been deducted before she was paid. She disagrees with the overpayment.

After hearing Ms. Casey present her appeal, the Committee referred to external counsel for a recommendation.

Dewayne Elam – Appeal to Waive Redcuion to Pension – Removal of Holiday and Unused Compensatory Time Payments from FAC – Personal Hearing via Teleconference – 9:45 a.m.

Jeff Houch, Associate Executive Secretary, informed the Committee that Mr. Elam had again requested to defer his appeal.

Jolan Shell – Appeal Denial of Nonoccupational Disability Benefits

Jolan Shell works for the Illinois Department of Human Services as a Mental Health Technician. She applied for SERS' nonoccupational disability benefit alleging disabling medical conditions since September 5, 2025.

Ms. Shell states that the exacerbation of her symptoms is due to increased work stress and she declined a trial of preventative medication for her condition.

Ms. Shell's file was sent to SERS' medical consultants for a determination. The reviewer found the medical evidence insufficient to support her incapacity to perform her job duties. They note that the records do not indicate that abortive medications are ineffective, and that Ms. Shell has refused the offer of additional medications.

Ms. Shell is appealing against the denial of nonoccupational disability benefits. She has submitted some additional medical evidence as well as a new CMS-95. This additional medical evidence has not been reviewed by SERS' medical consultants, as it was felt the it would not change their original determination.

Ms. Shell has requested a written appeal.

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

Karen Sherman – Appeal Denial of Nonoccupational Disability Benefits

Karen Sherman works for the Illinois Department of Human Services as a Security Therapy Aide IV. She applied for nonoccupational disability benefits due to medical conditions caused by environmental stressors in her workplace.

Additional medical evidence was requested, and her file was sent to MMRO. It was medically denied, stating the evidence did not prove that she was incapacitated from performing her job duties. Ms. Sherman requested to appeal this decision. She provided additional medical evidence, so her file was sent back to MMRO for an addendum to the original report.

The medical examiner found that the additional medical evidence still did not find Ms. Sherman disabled. The reviewer noted that the additional evidence did not indicate signs or symptoms associated with the member's diagnosis. They also noted that her stress is largely related to her workplace, which is indicative of an environmental stressor or situational stressor and not necessarily that of an underlying impairing condition. They further noted that the letter written by the member is eloquent and is a testament to the fact that she can focus, concentrate, express current circumstances, think critically and further substantiates the member's ability to function cognitively in a workplace environment.

Ms. Sherman is appealing against the denial of her claim. She is requesting a written appeal and asks that she be granted nonoccupational disability benefits.

After discussing the facts presented, Executive Secretary Blair moved to deny Ms. Sherman's appeal. The motion was seconded by Vice-Chairperson Black and passed unanimously.

#### Tahanee Ortiz – Appeal Denial of Nonoccupational Disability Benefits

Tahanee Ortiz is employed as a Human Resources Representative for the Illinois Department of Human Services. She applied for nonoccupational disability benefits alleging a disabling condition with an onset date of July 22, 2025.

Medical records show treatment for a related medical condition since November 21, 2019, with treatment for her most recent disabling condition beginning April 24, 2025. She is released to return to work by her doctor on February 2, 2026.

Ms. Ortiz's file was sent to SERS' medical consultants for a determination. The reviewer indicated that the medical documentation was insufficient to find her incapacitated from performing her job duties. The reviewer notes that the clinical record is based on the member's subjective reports of her symptoms and lacks objective clinical findings to corroborate a disabling level of functional impairment.

Ms. Ortiz is appealing against the denial of her claim. She is requesting a written appeal to the Executive Committee and is asking for her disability claim to be approved.

After reviewing the documentation provided, Executive Secretary Blair moved to deny Ms. Ortiz's appeal. The motion was seconded by Chairperson Becker and passed unanimously.

### Takesha McClane-Tsamis – Appeal Denial of Temporary Disability Benefits

Takesha McClane-Tsamis works as a Project Manager for the Illinois State Toll Highway Authority. She last worked on August 20, 2025. She began a medical leave of absence on October 12, 2025 due to various medical conditions. She filed a Workers' Compensation claim, which was denied. She then had to apply for SERS' temporary disability benefit.

After requesting additional medical records, her file was sent to SERS' medical consultants for a disability determination. The medical consultant found that the evidence was insufficient to show that she is incapacitated from performing her job duties and noted that lack of medication treatment also questions the severity of her conditions.

Ms. McClane is requesting a written appeal, asking that her claim for disability benefits be approved.

Following a review of the information presented, Vice-Chairperson Black moved to deny Ms. McClane-Tsamis' appeal. The motion was seconded by Executive Secretary Blair and passed unanimously.

### Michael Otto – Request for Reappeal to Calculate SERS Proportional Annuity Payment Utilizing Uncapped JRS Earnings Credits

On September 11, 2025, the Executive Committee unanimously denied Judge Otto's appeal for his future SERS pension calculation to utilize his earnings which exceed the earnings limitation applicable to Tier 2. The basis of the denial is that his pensionable salary under the Judges' Retirement System (JRS) is limited by 40 ILCS 5/18-1 25(b-5), and 40 ILCS 5/20-106(b) provides that the earnings credits used to calculate his SERS proportional retirement annuity shall reflect "any limitations on earnings for annuity purposes that are imposed by the Article governing the system."

Additionally, SERS lacks the authority to declare Public Act 96-0889 unconstitutional or even question its validity. Cinkus v. Vill. Of Stickney Mun. Officers Electoral Bd., 228 Ill. 2d 200,214, 886 N.E. 2d 1011, 1020 (2008), as modified (Apr. 23, 2008). The legislature's decision to confer benefits to judges under Article 18 that differ from benefits afforded under other Articles of the Pension Code is in the nature of economic regulation. SERS has no authority to determine whether such distinctions have a rational basis for purposes of the equal protection clause, nor does SERS have authority to determine whether Public Act 96-0889 constitutes special legislation. The assertion that Public Act 96-0889 violates the three-readings requirement is a facial challenge to the constitutional validity of the act.

Judge Otto's request for a reappeal was approved at the Committee's November 2025 meeting, and he provided supplemental information regarding this decision.

After reviewing the additional information provided, Chairperson Becker moved to

deny Judge Otto's reappeal. The motion was seconded by Vice-Chairperson Black and passed unanimously.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:13 a.m.

The next meeting of the Executive Committee is scheduled for January 8, 2026, in the System's Springfield office.

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Marvin Becker, Chairperson

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Arnold Black, Vice-Chairperson

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Timothy Blair, Executive Secretary