

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

March 13, 2025

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, March 13, 2024, 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
Cory Mitchell, Manager, Claims Division
Jessica Blood, Recording Secretary
Aaron Evans, Attorney, Sorling Northrup
Jacqueline Jordan, Claimant
Cecile Mays, Claimant's Associate

Other Present via Videoconference:

Serena Bonifazi, Stenographer
Marty Scott Jr., Claimant
Michelle Williams-Flowers, Claimant

Minutes of the Previous Meeting

Chairperson Becker presented the minutes of the Executive Committee's meeting on February 13, 2025, 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 Black and passed unanimously.

Routine Claims Report

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

Old Business

Felony Forfeiture Review - Recommendation

According to the records of the United States District Court for the Northern District of Illinois, on May 26, 2021, a special grand jury returned a two-count indictment of perjury and attempted obstruction of justice against Timothy Mapes. (United States v. Mapes, No. 21-CR-345 (N.D. Ill. May 26, 2021). On August 24, 2023, a jury found Mr. Mapes guilty of both counts. (United States v. Mapes, No. 21-CR-345 (N.D. Ill. August 24, 2023)). The offenses of perjury (18 U.S.C. § 1623(a) (2018)) and attempted obstruction of justice (18 U.S.C. § 1512(c)(2) (2018)) are felonies under federal law (18 U.S.C. §3559 (2018)).

SERS reached out to the Office of the Attorney General for an opinion on whether Mr. Mapes' felony convictions related to, arose out of, or were in connection with, his service as a State employee, thereby requiring the forfeiture of his SERS pension benefits. On January 22, 2025, SERS received the opinion from the Attorney General's Office that Mr. Mapes was convicted of felonies requiring the forfeiture of his pension benefits under the State Employees' Retirement System pursuant to section 14-149 of the Illinois Pension Code.

After a lengthy discussion regarding the information presented at their February 2025 meeting, the Committee directed SERS' general counsel to submit a recommendation for action at their next meeting.

Following a brief update regarding the facts of the case, SERS' general counsel, Samantha Goetz, presented a recommendation to direct staff to follow the Attorney General's opinion and suspend Mr. Mapes' pension.

New Business

Paul Moak – Appeal to Waive Reduction to Pension – Removal of Unused Compensatory Time Payment from FAC Calculation – Formal Personal Hearing via Teleconference

Jeff Houch informed the Committee that Mr. Moak's appeal would be deferred to their April meeting.

Jacquelyn Jordan – Appeal Overpayment of Disability Benefits – Formal Personal Hearing – Springfield – 9:45 a.m.

Jacquelyn Jordan works for the Department of Human Services as a Human Services Caseworker. She went on a non-service-connected leave of absence on April 28, 2023. Her disability claim was approved, and she began receiving benefits from SERS on May 31, 2023.

Ms. Jordan reached full SSA retirement age in September 2023, but SERS did not start

offsetting her benefit until September 2024. When Ms. Jordan called SERS about the reduction in her offset it was determined that she reached full retirement age in September 2023, and the offset should have started then. At the time of her entitlement, her SSA benefit was only \$1,669.00.

SERS paid Ms. Jordan the difference in the offset for September and October 2024. Starting November 2024, her monthly benefit is at the correct rate. SERS then set up an overpayment from September 2023, through August 2024.

Ms. Jordan is appealing her overpayment. She states she should have been aware that she needed to file for her Social Security benefits before October 15, 2024. She disagrees with the amount of the overpayment. She also states she has not received her first benefit check from SSA and that her retroactive check will not be anywhere near the overpayment that she owes SERS.

Ms. Jordan is requesting a personal appeal in the Springfield office and has requested a copy of the overpayment calculation sheet, which was emailed to her on January 2, 2025.

Ms. Jordan presented her appeal to the Committee. The oral proceedings were recorded by stenographer Serena Bonifazi, and the transcripts will be provided to Ms. Jordan and the Executive Committee. After discussing the information presented in Ms. Jordan's appeal, the Committee referred her case to external counsel for a recommendation.

Marty Scott Jr. – Appeal Denial of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – 10:30 a.m.

Marty Scott is employed at the Illinois Department of Corrections as a Correctional Officer. He applied for SERS' nonoccupational disability benefit with an onset of May 16, 2024.

Mr. Scott's file was sent to MMRO for a medical review. They determined that there were no documented symptoms, functional impairment or complications from his condition that would prevent him from doing his job.

Mr. Scott was sent a denial letter. He submitted additional medical evidence, and his file was returned to MMRO for reconsideration. MMRO returned another denial report. In this opinion, the reviewer indicated that the additional records did not reveal anything that would change the original opinion. While Mr. Scott required close monitoring and medication management, there was no support that the condition led to his incapacity.

Mr. Scott is appealing the denial of benefits. He stated that the severity of his condition caused his doctor to remove him from service as a Correctional Officer, because of its highly stressful nature. He also notes that his condition didn't return to normal until September 4, 2024.

Mr. Scott is asking for his disability benefit to be approved for the time he was out of work. He is requesting a personal appeal via telephone.

Following some discussion regarding the facts of the case, Executive Secretary Blair moved to approve Ms. Scott's appeal. The motion was seconded by Chairperson Black and passed unanimously.

Nicole Wills – Appeal to Recalculate Half-Time Ceasing Date – Personal Hearing via Teleconference

Jeff Houch informed the Committee that Ms. Wills' appeal would be deferred to their April meeting.

Michelle Williams-Flowers – Appeal Denial of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – 11:15 a.m.

Michelle Williams-Flowers works at the Department of Children and Family Services as a Child Welfare Staff Development Coordinator IV. She last worked October 15, 2024, and began a medical leave of absence on November 2, 2024, due to injuries sustained in a vehicle accident.

Ms. Williams-Flowers was sent a letter on December 31, 2024, stating the medical report form was insufficient to determine disability and requesting that she submit her medical records. She submitted additional records, and her claim was referred to MMRO on January 7, 2025, for review.

The MMRO Medical Consultant determined based on the review of medical evidence that there is no support that Ms. Williams-Flowers is mentally or physically incapacitated from performing her duties as a Child Welfare Staff Development Coordinator IV. They noted that her job is not physically demanding and allows her to rest if she does not need to exert herself. They state that while she does have some pain and is undergoing physical therapy, it does not preclude her from being able to do her job.

SERS sent a denial letter to Ms. Williams-Flowers on January 21, 2025. She is appealing the denial of benefits. She states she has limited mobility and memory loss as a result of her injuries, adding that her doctor has told her she will not be returning to work due to said injuries.

Ms. Williams-Flowers has submitted additional medical evidence for her appeal. She is requesting a personal appeal via telephone.

After hearing Ms. Williams-Flowers present her case and some discussion, the Committee decided to defer a decision pending an MMRO review of her additional documentation.

Denise Napier – Appeal Denial of Nonoccupational Disability Benefits

Denise Napier works as a Public Service Representative for the Illinois Secretary of State. She began a medical leave of absence on October 10, 2024, due to medical issues.

SERS sent Ms. Napier a letter on December 3, 2024, stating the medical report form was insufficient to determine disability and to request that she submit her medical records. She submitted additional records, and her claim was referred to MMRO for review.

The MMRO Medical Consultant determined based on the review of medical evidence that there is no support that Ms. Napier is mentally or physically incapacitated from performing her duties as a Public Service Representative. Based on the information provided, it was determined that she has no functional impairments or reported deficits that would indicate a need to restrict the use of her extremities.

SERS sent a denial letter to Ms. Napier on December 26, 2024. She is appealing the denial of benefits and has submitted additional medical evidence for review.

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

Harl Ray – Appeal to Purchase Service Credit and Retain January 1, 2025 Retirement Date

Harl Ray elected to begin his retirement benefit effective January 1, 2025. The cost to purchase his qualifying period and refunded service was issued to Mr. Ray on November 8, 2024. Shortly thereafter, Mr. Ray elected to establish this service credit as lump sum payment by transferring funds from his Deferred Compensation account, but he did not contact the Deferred Compensation Division of CMS to initiate the transfer.

On December 30, 2024, Mr. Harl emailed SERS to inquire about the status of his service purchase. He was not given a definitive answer at that time. He followed up on February 11, 2025, and was told SERS had not yet received the transfer. It was at that time that SERS discovered that he had not yet contacted the Deferred Compensation Division to transfer the necessary funds to cover the service purchase.

40 ILCS 5/14-104 and 40 ILCS 5/14-130(b) provides that a member must complete a service credit purchase or repay a refund prior to their retirement. Mr. Ray is appealing to the Committee to allow him to purchase this service credit and to keep his retirement date of January 1, 2025.

Following a discussion regarding the information provided, Executive Secretary Blair moved to allow Mr. Ray's requested service purchase and adjustment of his future benefit from the date the service purchase is completed. The motion was seconded by

Chairperson Becker and passed unanimously.

Jobina Rogers – Request to Reappeal Suspension of Nonoccupational Disability Benefits

Jobina Rogers works as Mental Health Technician I for the Department of Human Services. She last worked September 25, 2023. She was approved for a nonoccupational benefit and began receiving benefits on October 27, 2023.

Ms. Rogers' file was submitted to the MMRO consultants in July 2024 to determine her continued disability. The MMRO report found that she had experienced improvement in her impairments that no longer incapacitated her from performing her job duties.

Ms. Rogers' disability benefits were suspended August 31, 2024. Ms. Rogers appealed this decision and her appeal was denied.

Ms. Rogers is requesting a reappeal. She has submitted a letter and additional information in support of her disability claim, which was not reviewed previously.

After reviewing the documentation provided and some discussion, the Committee decided to defer a decision pending staff review of the additional documentation Ms. Rogers provided.

Gary Pignato – Request Reappeal to Waive Remaining Overpayment of Occupational Disability Benefits

On December 12, 2024, the Executive Committee denied Gary Pignato's appeal to waive his overpayment balance but also agreed to change his retirement effective date to November 1, 2021, which effectively reduced his overpayment balance.

Mr. Pignato is requesting a reappeal to waive approximately half of the remaining overpayment balance.

After determining that Mr. Pignato did not submit sufficient documentation to support his case, no member moved to allow a reappeal.

Gwen Dowling – Request to Reappeal Termination of Temporary Disability Benefits

On November 14, 2024, the Executive Committee unanimously denied Gwen Dowling's appeal when it adopted Recommendation 2024-12. Ms. Dowling has submitted additional information and is requesting a reappeal.

After discussing the facts of the case, the Committee decided to defer a decision pending staff review of the additional documentation provided.

There being no further business to be brought before the Committee, the meeting was

adjourned at 12:03 p.m.

The next meeting of the Executive Committee is scheduled for April 10, 2025, in the System's Springfield office.

Marvin Becker, Chairperson

Arnold Black, Vice-Chairperson

Timothy Blair, Executive Secretary