

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

May 13, 2025

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Tuesday, May 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

Other Present via Videoconference:

Amanda Arias, Stenographer
Kina Askew, Claimant
Michael Jackson, Claimant

Minutes of the Previous Meeting

Chairperson Becker presented the minutes of the Executive Committee's meeting on April 10, 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 April 2025 was presented. Following a brief discussion, the Routine Claims Report for April 2025 as prepared by staff was received by the Committee.

Old Business

Jacquelyn Jordan – Appeal Overpayment of Disability Benefits – Recommendation

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 initially presented her appeal to the Committee at their March 2025 meeting. The oral proceedings were recorded by stenographer Serena Bonifazi, and the transcripts were provided to Ms. Jordan and the Executive Committee. After discussing the information presented in Ms. Jordan's appeal, the Committee deferred a decision pending receipt of additional documentation.

After discussing the case in detail at their April 2025 meeting, the Committee decided to defer a decision pending additional research with the Social Security Administration.

Jeff Houch informed the Committee that he had confirmed the following information with the Social Security Administration:

- her "normal retirement/full retirement" date was September 1, 2023, and the monthly benefit amount she was entitled to as of that date was \$1,669.00;

- She elected to begin receiving her monthly SSA benefits effective February 1, 2024, and that monthly amount totaled \$1,799.00;
- Her first payment was issued in December of 2024 and included back pay retroactive to February 1, 2024, and
- Her monthly payment increased to \$1,856.00 in January 2025 due to the COLA.

After discussing the new information provided, the Committee delegated staff to reset the offset date to the effective date of her SSA benefit. The Committee additionally directed staff to set up a payment plan with Ms. Jordan for the remaining overpayment.

Carolyn Abernathy – Appeal to Remove Workers’ Compensation Death Benefit Offset – Formal Personal Hearing via Teleconference – Recommendation

Melvin Abernathy was a SERS member who passed away on March 29, 2017. His surviving spouse Carloyn Abernathy began receiving a survivor's annuity effective April 1, 2017. On June 26, 2023, Mrs. Abernathy was awarded a death benefit under the Workers' Compensation Act. On January 8, 2025, Mrs. Abernathy was notified that her SERS survivor's annuity or optional SERS occupational death benefit was subject to offset because she was awarded a death benefit under the Workers' Compensation Act.

SERS contends that a SERS annuity payable to any eligible survivor must be offset by the death benefit they receive under the Workers' Compensation Act, see 40 ILCS 5/14-129 and Title 80, Section 1540.90 a) of the Illinois Administrative Code.

Through her attorney, Mrs. Abernathy is appealing to remove the Workers’ Compensation Death benefit offset from her SERS benefit. SERS staff believe the basis of the appeal is that she was not dependent on Mr. Abernathy at the time of his death.

Scott Moran, attorney for Mrs. Abernathy, presented her appeal to the Committee at their April 2025 meeting. The oral proceedings were recorded by stenographer Gina Tomasone, and the transcripts provided to Mrs. Abernathy and the Executive Committee. After discussing the information presented in Mrs. Abernathy’s appeal, the Committee decided to refer to external counsel for a recommendation.

Attorney Evans presented Recommendation No. 2025-3, to deny Mrs. Abernathy’s appeal. Executive Secretary Blair moved to adopt Recommendation No. 2025-3. Chairperson Becker seconded the motion, which passed unanimously.

Kelly Ellis – Appeal Denial of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – Recommendation

Kelly Ellis works as a Mental Health Recovery Support Specialist I for the Department of Human Services. She last worked November 1, 2024, and began a leave of absence November 7, 2024, due to multiple medical conditions. She has not returned to work.

Ms. Ellis' file was sent to MMRO, SERS' medical consultants, for a determination of disability. MMRO found that her records did not support her incapacity to perform her duties. Her exams were normal overall. They also noted that the intensity of services provided to Ms. Ellis once every four weeks is not a frequency of services typical for an individual with an impairment such as Ms. Ellis'.

Ms. Ellis is requesting a telephone appeal of her nonoccupational disability claim denial. She feels she is unable to work at this time and states her doctor has taken her off work until June 2025. She has not supplied any other supporting medical evidence for her appeal at this time.

After hearing Ms. Ellis present her case at their April 2025 meeting, the Committee decided to refer to external counsel for a recommendation after receiving additional documentation from Ms. Ellis.

Attorney Evans presented Recommendation No. 2025-4, to deny Ms. Ellis' appeal. Executive Secretary Blair moved to adopt Recommendation No. 2025-4. Chairperson Becker seconded the motion, which passed unanimously.

New Business

Dewayne Elam – Appeal to Waive Reduction to Pension – Removal of Holiday and Compensatory Time Payments from FAC Calculation – Formal Personal Hearing via Teleconference

Jeff Houch informed the Committee that Mr. Elam had requested to defer his hearing until their July 2025 meeting.

Nicole Hoppe (Wills) – Appeal to Recalculate Half-Time Ceasing Date – Formal Personal Hearing via Teleconference

Jeff Houch informed the Committee that Ms. Hoppe had requested to defer her hearing at this time.

Kina Askew – Appeal Denial of Nonoccupational Disability Benefits – Formal Personal Hearing via Teleconference – 9:45 a.m.

Kina Askew works as a Diversity Equity and Inclusion Outreach Associate for the Illinois Power Agency. She applied for two separate nonoccupational disability benefits. The first claim related to her recovery from surgery and the second claim related to separate medical conditions.

Ms. Askew underwent a procedure in August 2024. She returned to work after her

maternity leave and then had to undergo a separate surgery on November 26, 2024, which required 4 weeks off for adequate post-op recovery.

Ms. Askew's file was sent to MMRO for medical review for each of her alleged disabling conditions. The medical consultant determined that Ms. Askew would have been disabled from performing her job due to her surgery from November 26, 2024, through December 23, 2024. This is only 28 days and does not meet the requirement that their disability keep them from performing their job duties for more than 30 days.

The medical consultant also determined that there was insufficient evidence to suggest that the member was unable to perform her job duties due to her separate medical conditions. There is no objective finding of functional deficits related to her reported symptoms.

Ms. Askew is appealing against the denial of benefits. She is requesting a thorough reconsideration of her case based on her medical evidence. She has submitted some additional medical evidence to support her claim and is requesting a personal hearing via telephone.

Ms. Askew presented her appeal to the Committee. The oral proceedings were recorded by stenographer Amanda Arias, and the transcripts will be provided to Ms. Askew and the Executive Committee.

After reviewing the information presented and some discussion, the Committee decided to defer a decision pending further research into the facts of her case.

Dennis Austin – Appeal Overpayment of Disability Benefits – Personal Hearing - Springfield

Jeff Houch informed the Committee that Mr. Austin had requested to defer his hearing at this time.

Rebecca Holz – Appeal Denial of Nonoccupational Disability Benefits

Rebecca Holz works as a Region Itinerant Rehabilitation Field Services Supervisor for the Department of Human Services. She applied for nonoccupational disability benefits due to alleged medical conditions. Her provider suggested she could return to work under a different supervisor or in a different location.

Ms. Holz's file was sent to MMRO for a medical consultant review. MMRO determined that there was insufficient support that Ms. Holz is incapacitated from performing her job duties. It was noted that the Primary Care provider clearly noted that she was able to return to work, but recommended accommodations of an alternate supervisor or alternate work location. Additionally, the reviewer opined that there appears to be insufficient support for incapacitation even if the accommodations could not be granted.

Ms. Holz is appealing against the denial of her disability claim. She has provided additional documentation and states she is on approved medical leave through May 7, 2025.

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

Tim Mapes

Timothy Mapes was sentenced for the offenses of perjury and attempted obstruction of justice to 30 months imprisonment. The Committee heard the recommendation from General Counsel at their March 13, 2025 meeting to forfeit Mr. Mapes benefits due to the felonies relating to, arising out of, or being in connection with his services as a State employee and upon the opinion from the Illinois Attorney General's Office, pursuant to 40 ILCS 5/14-149.

Mr. Mapes, through his attorney, appealed the finding of the Committee, and contends that the forfeiture of benefits would be an unlawful and unprecedented extension of the law. Mr. Mapes argues that his conviction was not related to, arising out of, or in connection with his public duties. Mr. Mapes contends that the testimony given to the grand jury was done as a private citizen and occurred after Mr. Mapes retired. Mr. Mapes also states that the limited evidence presented at trial dealt with Mr. Mapes' political role as Executive Director of the Democratic Party of Illinois – not his pension-eligible role of Chief of Staff. Finally, Mr. Mapes argues that since the government has decided not to re-try the "Com Ed Four", where Mr. Mapes perjurious testimony, which was hotly contested at trial, was purportedly connected to the Com Ed investigation, goes directly to the materiality of Mr. Mapes' alleged perjury.

Following some discussion regarding the information provided, Vice-Chairperson Black moved to deny Mr. Mapes' appeal. The motion was seconded by Chairperson Becker and passed unanimously.

Krista Austin – Appeal Overpayment of Nonoccupational Disability Benefits – Gainful Employment

Krista Austin works for the Illinois Department of Revenue. She went on nonoccupational disability leave in August 2024 and was paid through March 18, 2025. She returned to work March 29, 2025.

An IDES report showed that Ms. Austin was working for Triune Logistics, LLC., and exceeded the quarterly earnings limitation in the 4th quarter of 2024. An overpayment was set up and Ms. Austin was sent a letter and an Earnings Agreement to sign and return.

Ms. Austin is appealing the overpayment. She states she has never worked for this

company, which appears to be a staffing agency. She did indicate on her certification form that she had been earning some money while on disability. She submitted all of her paystubs for the 4th quarter of 2024.

Ms. Austin states she is being paid by Aces\$ Financial Management Services and the money comes into a bank account through her husband, Eric Austin. She states this money is sent to her because her disabled aunt lives with her, and she is her caretaker. She states she does very little to assist her aunt, and the payments are more like "boarding costs". Ms. Austin says she makes sure her aunt takes her medications, assists with cooking and doing dishes, making sure she is dressed properly. She states she is just assisting her family member with daily activities. She does not feel this is a gainful activity and that she should not have any overpayment with SERS as she is not actively working another job.

After reviewing her check stubs, it was determined that Ms. Austin did exceed the quarterly earnings limitation in the 4th quarter of 2024. She also provided her bank account statements, to show that she has never received any pay from Triune Logistics.

Ms. Austin is appealing against the overpayment. She does not feel she is performing work to receive these payments.

After reviewing the facts of the case, the Committee decided to defer a decision pending further research into Ms. Austin's earnings.

Deja Sawyer – Appeal Denial of Nonoccupational Disability Benefits

Ms. Sawyer works for the Illinois Department of Human Services as a Human Services Caseworker. She states her disability began on August 22, 2023, but she stopped working on January 14, 2025. She stated she will be returning to work on June 15, 2025.

Ms. Sawyer's file was sent to MMRO to be reviewed by our medical consultants. The reviewer stated, "with a reasonable degree of medical certainty, as based on the available medical evidence reviewed, the member is considered mentally and physically capable of performing their duties as a Human Service Caseworker". It was also noted that treatment for Ms. Sawyer's alleged disabling condition has been very limited.

Ms. Sawyer is appealing against the denial of her disability claim and has provided additional medical evidence from her health care provider.

After reviewing the documentation provided, Vice-Chairperson Black moved to deny Ms. Sawyer's appeal. The motion was seconded by Chairperson Becker and passed unanimously.

Tyler Wingo – Appeal Denial of Nonoccupational Disability Benefits

Tyler Wingo works as an Educator for the Illinois Department of Corrections. He last

worked on October 18, 2024. He began a medical leave of absence on November 15, 2024, due to various medical issues. Additional medical records were requested, and he submitted an office visit from January 2025. Mr. Wingo's file was sent to SERS' medical consultants for a review.

The consultant determined that the medical evidence did not support Mr. Wingo's incapacity to perform his job as an Educator. He referred to the note from January 2025, in which the provider noted that one of Mr. Wingo's conditions had improved but made no mention of his other alleged disabling conditions. The consultant also pointed out that the medical report form completed by his provider stated he could return to work on December 19, 2024. He concluded that there are no objective findings to support his inability to perform his job duties.

Mr. Wingo is appealing against the denial of nonoccupational disability benefits. He states he is currently receiving treatment for his disabling conditions and that these conditions significantly impair his ability to perform his daily and work activities. He states his provider put him on medical leave in order to focus on treatment and recovery and included a letter from this provider supporting his claim.

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

James Cremeens – Appeal Overpayment of Disability Benefits

James Cremeens works for the Illinois Department of Transportation as a Highway Maintainer. He was injured at work on July 30, 2021 and started an occupational disability benefit with SERS on August 1, 2021.

SERS learned in late March 2025 that Workers' Compensation had stopped TTD benefits for Mr. Cremeens on July 25, 2023. They paid more TTD from October 4, 2023, through October 13, 2023. SERS calculated an overpayment of TTD benefits from July 26, 2023 through October 3, 2023, and from October 14, 2023, through November 19, 2024. TTD benefits were reinstated November 20, 2024, and Mr. Cremeens remains on SERS' 7T occupational disability benefit.

Mr. Cremeens is appealing the overpayment of benefits. He states he has an active claim before the IWCC, and that any determination of an overpayment is premature. He further requests that collection efforts should be suspended until after he has a final ruling by the IWCC.

Following a discussion regarding the facts of the case, Executive Secretary Blair moved to approve Mr. Cremeens' appeal to suspend collection of his overpayment until his final IWCC decision. The motion was seconded by Chairperson Becker and passed unanimously.

Michael Jackson – Appeal Denial of Nonoccupational Disability Benefits – Personal

Hearing via Teleconference – 10:30 a.m.

Michael Jackson works as a Security Therapy Aide I for the Department of Human Services. He applied for nonoccupational disability benefits due to disabling conditions caused by assaults from residents.

Mr. Jackson's records were sent to SERS' medical consultants for review. The medical reviewer noted that Mr. Jackson's symptoms were not detailed, and he had no progress notes from his provider for review. The medical notes provided were minimal, and a brief mental status exam was unremarkable. His prescription for his disabling was noted to be a low dose, which would not reflect the severity of symptoms to support incapacitation. The reviewer concluded that there was insufficient documentation to consider him incapacitated for the performance of duties as a Security Therapy Aide I.

Mr. Jackson is appealing against the denial of his disability claim. He states he was physically assaulted by an inmate in 2021 and 2023. Mr. Jackson never filed Workers' Compensation claims for these instances. He states he has problems performing his job duties due to these events.

Mr. Jackson states in his appeal letter that he is now having additional medical issues related to these workplace assaults. He doesn't think he could keep others safe if he returned to his job. He added that he's trying to get a nonoccupational disability benefit, as it is too late to claim a WC injury.

Mr. Jackson submitted a new Nonoccupational Disability Medical Report, dated April 10, 2025 and a copy of a CMS-95 Physician's Statement dated April 10, 2025. Both forms state Mr. Jackson has restrictions of no work in stressful situations, and Class 3 impairment - slight limitation of functional capacity - light work. He has a return-to-work date of December 31, 2025.

After reviewing the information provided and some discussion, the Committee decided to defer a decision pending receipt of additional objective medical documentation from Mr. Jackson.

Felony Forfeiture Review

SERS retiree Daniel Schott was convicted of one felony count under case No. 19-CF-266 out of the Monroe County Circuit Court.

SERS reached out to the Office of the Attorney General for an opinion on whether Mr. Schott's felony conviction related to, arose out of, or were in connection with his service, thereby requiring the forfeiture of his SERS pension benefits. On April 7, 2025, SERS received an informal comment from the Office of the Attorney General stating that the information provided does not show that Mr. Schott has been convicted of a service-related felony that would justify the forfeiture of his pension benefits under the State Employees' Retirement System pursuant to section 14-149 of the Illinois Pension Code.

Samantha Goetz briefed the Committee on the provided informal comment from the Attorney General's office and noted that Mr. Schott's benefit was reinstated in April 2025.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:50 a.m.

The next meeting of the Executive Committee is scheduled for June 12, 2025, in the System's Springfield office.

Marvin Becker, Chairperson

Arnold Black, Vice-Chairperson

Timothy Blair, Executive Secretary