

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

April 16, 2026

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, April 16, 2026, 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
Jacob Schlosser, General Counsel
Cory Mitchelle, Claims Division Manager
Jessica Blood, Recording Secretary
Aaron Evans, Attorney, Sorling Northrup
Brittany Beal, Claimant

Others Present via Teleconference:

Ann Patton, Claimant

Minutes of the Previous Meeting

Vice-Chairperson Black presented the minutes of the Executive Committee's meeting on March 20, 2026, for approval. Copies of the minutes were previously emailed to Committee members for review. Vice-Chairperson Black moved to approve the minutes as submitted. The motion was seconded by Executive Secretary Blair and passed unanimously.

Routine Claims Report

The Routine Claims Report for March 2026 was presented. Following a brief discussion, the Routine Claims Report for March 2026, as prepared by staff, was received by the Committee.

Old Business

Kenneth Mendoza – Appeal Denial of Nonoccupational Disability Benefits – Recommendation

Kenneth Mendoza worked as a Security Therapy Aide I for the Department of Human Services but left the payroll on July 31, 2025. He applied for nonoccupational disability benefits for various medical conditions.

MMRO has reviewed his medical evidence and produced two reports which concluded that there is not enough support based on the medical records provided to determine that he is incapacitated to perform his job duties. Key observations that led to this outcome are that he has not been prescribed medications for his alleged conditions, nor has he completed a comprehensive examination to clarify his diagnosis further.

Following a review of the information provided and the testimony of Mr. Mendoza and his associate Andrea Barr at their March 2026 meeting, the Committee referred to external counsel for a recommendation.

Mr. Houch informed the committee that new medical evidence submitted by Mr. Mendoza was reviewed by SERS's consulting physician, who recommended the claim's approval, which was approved by Staff.

Edwin Boggess – Appeal Overpayment of Benefits – Social Security Offset – Personal Hearing via Teleconference – 9:45 a.m.

Edwin Boggess is receiving a retirement annuity and a survivor's annuity. He began receiving a survivor's annuity effective September 1, 2025, and such benefit was subject to offset due to the dynamics of his Social Security (SSA) survivor's benefit, see 40 ILCS 5/14-12l (g).

The monthly offset amount of \$383.50 was calculated in accordance with Title 80, Section 1540.90 c) 10) of the Illinois Administrative Code:

Mr. Boggess' Monthly SSA survivor's benefit - \$3,042.80

Mr. Boggess' Monthly SSA pension based on his service - \$2,275.80

$\$3,042.80 - \$2,275.80 = \$767$

$\$767/2 = \383.50

His initial SERS monthly gross survivor's annuity should have been offset but was not until January 1, 2026. This created an overpayment of benefits. Mr. Boggess repaid SERS in full on February 17, 2026.

Mr. Boggess disagrees with these findings and had questions and concerns about the calculation of his offset.

Following some discussion between staff and Mr. Boggess at their March 2026 meeting, the Committee reviewed all information provided and referred to external counsel for a

recommendation.

Attorney Evans presented Recommendation No. 2026-3, to deny Mr. Boggess' appeal. Vice-Chairperson Black moved to adopt Recommendation No. 2026-3. Executive Secretary Blair seconded the motion, which passed unanimously.

Doris Paino – Appeal Monthly Recoupment Amount – Disability Benefit Overpayment

Doris Paino was paid nonoccupational disability benefits from October 18, 2023, through November 30, 2024. She was awarded Social Security Disability Benefits (SSDI) effective March 1, 2024, and her SERS nonoccupational disability benefits were fully offset by the amount of her SSDI, which created an overpayment of benefits.

Ms. Paino retired effective December 1, 2024, and SERS garnished the "net amount" of her survivor's contribution refund and applied it towards the overpayment balance. Her initial repayment plan was for \$171.57 per month.

Ms. Paino is appealing to reduce her monthly offset to \$100 per month.

Following a discussion regarding the facts presented at their March 2026 meeting, the Committee decided to defer a decision pending receipt of additional information.

Following a discussion regarding the additional information presented, Executive Secretary Blair moved to approve Ms. Paino's appeal to reduce her monthly offset to \$100. Vice-Chairperson Black seconded the motion, which passed unanimously.

New Business

Brittany Beal – Appeal Retroactive SSA Award Overpayment – Personal Hearing – Springfield – 9:00 a.m.

Brittany Beal works for the Illinois Department of Healthcare and Family Services as a Child Support Specialist. She was on SERS' nonoccupational disability benefits from January 28, 2023, through July 7, 2024. She returned to work on July 8, 2024.

Ms. Beal was referred to Midwest Disability and accepted by them in April 2024. SERS was notified that her SSA claim was approved and received her notice of award on March 16, 2026. Ms. Beal received \$2,026.77 per month from SERS. Her SSA disability entitlement began on August 1, 2023, and she received an initial entitlement amount of \$1,676.00 per month.

SERS set up an overpayment of benefits from August 1, 2023, through July 7, 2024. This is a total of 11 months and 7 days in which benefits were overpaid. Her overpayment equals \$18,814.45.

Ms. Beal is appealing against her overpayment of \$18,814.45. She states she was unaware that she would have to pay back anything to SERS. She states even a

payment plan would cause hardship for her. She states she would like SERS to reconsider the decision to collect on previously paid disability benefits and has requested a personal appeal in the Springfield office.

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

Ann Patton – Appeal Retroactive SSA Award Overpayment – Personal Hearing via Teleconference – 9:45 a.m.

Ann Patton worked for the Department of Children and Family Services (DCFS) as a Child Protection Investigator. She has been on SERS' nonoccupational disability benefits since February 3, 2023.

Ms. Patton's Social Security Disability benefit (SSDI) claim was accepted by Midwest Disability in May 2024. In January of 2026, SERS received notice that her SSDI claim was approved in December 2025.

Ms. Patton's gross monthly SERS disability benefit totaled \$3,755.30. Her SSDI benefit entitlement date began on July 1, 2023, and she received an initial entitlement amount of \$2,800.00 per month. The amount of her award totaled \$80,314.00, and represented back pay from July 1, 2023, through October 31, 2025. Her SERS nonoccupational disability benefit was first offset with her January 2026 payment. Her monthly nonoccupational disability benefit after the offset totals \$955.30.

SERS set up an overpayment of benefits from July 1, 2023, through December 31, 2025. This is a total of 30 months in which benefits were overpaid. Her overpayment was calculated as:

$$\$2,800 \times 30 = \$84,000.00.$$

Ms. Patton is appealing against the decision to repay \$84,000. She states she only received back pay from SSA in the amount of \$80,314 and some of that money has already been spent. She states even a payment plan would cause hardship for her. She states she doesn't want to have to pay the full \$84,000 back.

Ms. Patton has requested a personal appeal via teleconference.

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

Karly Sims – Appeal Disability Benefit Conversion Overpayment

Karly Sims went on a non-service-connected leave of absence in July 2023 and was paid a nonoccupational disability benefit from August 24, 2023 through October 17, 2024. On her application she alleged bereavement due to the sudden death of her son. She provided medical records that showed treatment for bereavement related illness and

her doctor's recommendation to keep her off work.

SERS recently received a Workers' Compensation settlement with the date of injury as April 2023, but not going off work until July 2023. At the time, SERS did not pay Ms. Sims any TTD benefits. Medical records on file show that she underwent an unrelated procedure in August 2023. In December 2023 she had an additional procedure unrelated to her bereavement. She then had an additional unrelated procedure in May 2024. She had a release to return to work from her physical impairments in October 2024, and that is when she returned to work.

SERS contends that although she was suffering from bereavement due to the loss of her son, she was also treated for her workers' compensation injuries. The dates of her leave from work coincide with her first procedure date and her release by her doctor for the physical impairments is when she returned to work. Therefore, it is the staff's opinion that Ms. Sims was unable to work due to her procedures and recovery. This is supported by the fact that she received a Workers' Compensation settlement for the injuries she was treated for during her time off work.

The conversion of her nonoccupational disability benefit to an occupational disability benefit resulted in an overpayment of benefits. Ms. Sims is requesting a written appeal against this overpayment. She is asking that the overpayment be waived; or a substantial reduction in the amount owed and/or a reasonable repayment arrangement based on her financial situation.

Following some discussion regarding the information presented, the Committee deferred a decision pending additional research.

Gregory Douglas – Appeal to Elect Reversionary Annuity Option

Gregory Douglas retired effective February 1, 2026. He initially elected to provide a reversionary annuity and the Social Security offset removal option but also elected the COLA buyout and waived his initial election for the reversionary annuity and the Social Security offset removal option.

Subsections b) 2) and b) 3) of Title 80, Section 1540.395 of the Illinois Administrative Code provide that a member cannot receive a COLA buyout and either participate in the reversionary annuity option, or the Social Security offset removal option. Mr. Douglas' COLA buyout has not yet been issued.

Mr. Douglas is appealing to rescind his COLA buyout election in order to participate in the reversionary annuity option and the Social Security offset removal option.

Following a review of the information provided and some discussion, Executive Secretary Blair moved to approve Mr. Douglas's appeal. The motion was seconded by Vice-Chairperson Black and passed unanimously.

Judy Urton – Appeal to Defer Retirement Effective Date after Retirement

Judy Urton retired effective January 1, 2026. Her age at retirement was 62 years, 2 months. Her starting monthly gross pension amount is \$641.32. Since she is a Tier 2 member, her starting monthly annuity was reduced by 29%, see 40 ILCS 5/1-160(d). This reduction equated to \$261.95 per month.

Ms. Urton is requesting to defer her retirement effective date to the month following her 67th birthday.

After discussing the facts presented, Executive Secretary Blair moved to approve Ms. Urton's appeal to rescind her current retirement and defer her retirement effective date to the month following her 67th birthday. The motion was seconded by Chairperson Becker and passed unanimously.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:28 a.m.

The next meeting of the Executive Committee is scheduled for May 14, 2026, in the System's Springfield office.

Marvin Becker, Chairperson

Arnold Black, Vice-Chairperson

Timothy Blair, Executive Secretary