

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

March 20, 2026

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Friday, March 20, 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
Jessica Blood, Recording Secretary
Aaron Evans, Attorney, Sorling Northrup
John Halas, Claimant
Mary Cannon, Claimant's Associate

Others Present via Teleconference:

Kenneth Mendoza, Claimant
Andrea Barr, Claimant's Associate
Edwin Boggess, Claimant

Minutes of the Previous Meeting

Chairperson Becker presented the minutes of the Executive Committee's meeting on February 5, 2026, 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 Executive Secretary Blair and passed unanimously.

Routine Claims Report

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

Old Business

There was no old business.

New Business

Kenneth Mendoza – Appeal Denial of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – 9:00 a.m.

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 mentally 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, the Committee referred to external counsel for a recommendation.

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, the Committee reviewed all information provided and referred to external counsel for a recommendation.

Lori Rees – Appeal for Recalculation of FAC – Personal Hearing – Springfield – 10:30 a.m.

Jeff Houch informed the Committee that Ms. Rees requested to defer her appeal.

John Halas – Request to Reappeal for 20-Year Pension Benefits with Insufficient Service Credit

On October 15, 2025, the Executive Committee unanimously denied John Halas' appeal to increase his service credit to 20 years so that he could qualify for an alternative formula benefit. The committee denied his appeal because such action is contrary to 40 ILCS 5/14-107, 40 ILCS 5/14-108, and 40 ILCS 5/14-110(a).

Mr. Halas is requesting a reappeal of this decision.

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

Lisa Hartline – Appeal for Overpayment Recoupment Relief

Lisa Hartline was paid temporary disability benefits from June 24, 2019, through August 19, 2021. She received a Workers' Compensation Act award on August 25, 2025. She was erroneously issued a payment which represented a prior underpayment related to the retroactive conversion of temporary disability benefits to occupational disability benefits.

An audit determined that the Workers' Compensation award did not cover the June 24, 2019, through August 19, 2021 period, and that the payment was overpaid.

Ms. Hartline is appealing for relief in the recoupment of the overpayment.

Following a review of the information presented, Executive Secretary Blair moved to deny Ms. Hartline's appeal and offer a 60-month repayment plan. The motion was seconded by Vice-Chairperson Black and passed unanimously.

Toni Davidson – Appeal to Change Retirement Date

Toni Davidson retired on December 1, 2025, and elected to retire reciprocally with the State Universities' Retirement System (SURS). She has elected the "COLA buyout" with both SERS and SURS. She submitted her retirement application with SURS on December 8, 2025, and under their administrative rules, a retirement claim with a COLA buyout is only effective the month after receipt of the application, see Title 80,

Section 1600.461 c) 1). That means her earliest retirement eligibility date with SURS is January 1, 2026.

Ms. Davidson is appealing to change her SERS retirement annuity effective date to January 1, 2026.

After reviewing the case and some discussion, Chairperson Becker moved to approve Ms. Davidson's appeal. The motion was seconded by Executive Secretary Blair and 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 a period of 60 months.

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

Following a discussion regarding the facts presented, the Committee decided to defer a decision pending receipt of additional information.

Tyler Taber – Appeal of Temporary Disability Benefit Overpayment

Tyler Taber was paid nonoccupational disability benefits from August 9, 2025, through January 31, 2026. However, it was discovered that his physician determined he was able to return to work on October 23, 2025. Therefore, all benefits paid after that date are overpaid and must be recouped.

Mr. Taber has requested a written appeal of this outcome.

Following a discussion regarding the case, Chairperson Becker moved to deny Mr. Taber's appeal. The motion was seconded by Executive Secretary Blair and passed unanimously.

Add-on: Amy Bahr – Appeal Overpayment of Disability Benefits

Amy Bahr works for the Department of Human Services at Chester Mental Health Center, Rehabilitation Services as a Vocational Instructor. She last worked July 30, 2024 and went on a medical leave of absence for various medical conditions.

A CMS-95 submitted to her agency indicated that she has permanent restrictions due to her mental health, so the agency would not let her return to work. The agency stated

that a Vocational Instructor also must undertake the duties of a Security Therapy Aide when required, and they would not take her back.

SERS kept Ms. Bahr on disability because the agency said she could not perform her job duties due to her permanent restrictions. The member was able to get an updated letter from her doctor saying with medication she could be released to return to work without restrictions.

Because the agency would not allow her to return to work because of previous medical reports that she did have permanent restrictions, Disability kept her on the benefit.

After discussion with the Claims Division Manager and Administration, Disability was instructed to stop her disability benefit at the time her doctor said she could be released without restrictions. This created an overpayment of benefits.

Ms. Bahr is requesting a written appeal of the overpayment.

Following a discussion of the information presented, Executive Secretary Blair moved to deny Ms. Bahr's appeal to waive her overpayment and pause collection efforts until her grievance with her agency is arbitrated. 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 11:05 a.m.

The next meeting of the Executive Committee is scheduled for April 16, 2026, in the System's Springfield office.

Marvin Becker, Chairperson

Arnold Black, Vice-Chairperson

Timothy Blair, Executive Secretary