

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

February 10, 2022

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, February 10, 2022, at 8:45 a.m. in the System's Springfield office at 2101 S. Veterans Parkway and by videoconference as allowed under Section 7(e) of the Open Meetings Act (5 ILCS 120/7(e)).

Committee Members Present:

Marvin Becker, Chairperson
David Morris, Vice-Chairperson
Timothy Blair, Executive Secretary

Others Present:

Jeff Houch, Assistant to the Executive Secretary
Eric Glaub, Manager, Claims Division
PJ Budd, Assistant Supervisor, Disability Section
Aaron Evans, Attorney, Sorling Northrup
Jessica Blood, Recording Secretary
Victor Rodriguez, Claimant
Mark Arnequilla, Claimant's Attorney

Minutes of the Previous Meeting

The minutes of the Executive Committee's meeting on January 13, 2022, were presented by Chairperson Becker for approval. Copies of the minutes were previously e-mailed to Committee members for review. Chairperson Becker moved to approve the minutes as submitted. The motion was seconded by Vice-Chairperson Morris, and by unanimous vote, the minutes were approved by the Committee members present.

Routine Claims Report

The Routine Claims Report for January 2022 was presented. Following review and discussion, the Routine Claims Report for January 2022 as prepared by staff, was received by the Committee.

Old Business

Raymond Bouton – Appeal of Adjustment to Monthly Pension Amount – Deferred

Mr. Eric Glaub, Claims Division Manager, informed the Committee at its July meeting that Mr. Bouton had asked to defer his case until he is able to attend the hearing in person.

Mr. Glaub reminded the Committee that Mr. Bouton had requested a formal hearing that would be scheduled as soon as logistically possible.

Yeashea Figgures-Lawton – Appeal of Non-occupational Disability Benefit Claim Denial – Deferred

Yeashea Figgures-Lawton works as a Correctional Officer II for the Illinois Department of Corrections. She last physically worked on February 3, 2021. A medical leave of absence was started on February 16, 2021. She applied for a non-occupational disability benefit. The medical report received indicated an onset date of February 3, 2021. There was no release date for her return to work, no medical diagnosis for her pain, and no restrictions were given.

Additional medical records were requested and received. The case file was sent to a medical consultant for review. The medical consultant indicated that the medical evidence in the file supported disability, but not until June 29, 2021.

Ms. Figgures-Lawton started a maternity leave on July 12, 2021. Therefore, she was not disabled for 30 days before she received full payment from her agency for the 10 weeks of maternity leave. She did not return to work after her maternity leave and has not supplied additional medical evidence to support her inability to return to work. As a result, the non-occupational disability claim was denied.

Ms. Figgures-Lawton is appealing the denial of her non-occupational disability claim. She is requesting her claim be approved effective February 2021, as well as for her current time away from work.

After hearing Ms. Figgures-Lawton present her case at their November 2021 meeting, the Committee decided to defer a decision pending receipt of further medical documentation to support her disability from April 2021 through present.

Mr. Glaub reminded the committee that Ms. Figgures-Lawton submitted new medical documentation that had been reviewed by an independent medical examiner. The Committee decided to defer a decision until each committee member has reviewed the medical report provided by the independent medical examiner.

Victor Rodriguez – Appeal of Disability Benefit Overpayment Amount and Repayment Terms

Victor Rodriguez worked for the Illinois Department of Transportation. He was injured on the job on May 4, 2019, and filed a Workers' Compensation (WC) claim. His claim was denied, and he appealed this denial by filing an Application for Adjustment of Claim. He then applied for a SERS temporary disability benefit.

Mr. Rodriguez received temporary disability benefits from SERS from May 14, 2019 through May 10, 2020. He returned to work on May 11, 2020.

Mr. Rodriguez won his WC appeal and was awarded TTD payments for part of the period SERS temporary disability benefits were paid. He also received a lump sum settlement; therefore, SERS converted his temporary disability benefits into occupational disability benefits, which created an overpayment.

The conversion for the settlement resulted in an overpayment of \$8,971.76 and the conversion for the TTD payments resulted in an overpayment of \$11,171.41, for a total overpayment of \$20,143.17 owed to SERS.

Mr. Rodriguez is appealing to seek a reduction in the total overpayment, in addition to a reduction in the monthly repayment terms. The reduction is specifically in the amount of \$11,424.74, which was the cost for attorney fees. He is requesting to repay the remaining overpayment in monthly installments of \$300.

After hearing Attorney Arnequilla present Mr. Rodriguez's case, the Committee decided to refer the case to external counsel for a recommendation. Per Attorney Arnequilla's request, the Committee further decided to cease collection efforts on Mr. Rodriguez's overpayment until his case could be resolved.

New Business

Tambla Elliott – Appeal to Receive Survivor Contribution Refund after Retirement

Tambla Elliott retired November 1, 2021. She completed her application stating she was divorced with one dependent and did not want to receive the survivor contribution refund.

Ms. Elliott is appealing to receive the survivor contribution refund after retirement.

After a brief discussion regarding the facts of the case, Executive Secretary Blair moved to deny Ms. Elliott's appeal. The motion was seconded by Chairperson Becker and passed unanimously.

Terrence Murphy – Appeal of Adjustment to Monthly Pension Benefit Amount

SERS was recently made aware that beginning in June 2020, the Illinois State Police began allowing their employees to cash in compensatory time at the end of each fiscal year, instead of waiting until the end of their career.

Terrence Murphy retired August 1, 2021. His file was recently reviewed for the compensatory payout, and it was discovered that none of the payout was for time worked during his Final Average Compensation (FAC) period. The removal of these earnings resulted in a reduction of Mr. Murphy's monthly gross annuity. The

recalculation also resulted in an overpayment of pension benefits.

Mr. Murphy is appealing the reduction to his monthly pension amount.

Following a review of the case, Executive Secretary Blair moved to deny Mr. Murphy's request. The motion was seconded by Chairperson Becker and passed unanimously.

Roy Smith, Jr. – Reinstatement of Written-Off Account for Reciprocal Service

Roy Smith, Jr.'s account was written-off in June 2017.

Mr. Smith, Jr. is requesting his account be reinstated as he is reciprocal with SURS. His address on file is correct and he has supplied proper identification.

After a brief discussion, Executive Secretary Blair moved to approve Mr. Smith, Jr.'s request. The motion was seconded by Chairperson Becker and passed unanimously.

Brian Castro – Reinstatement of Written-Off Account for Refund of Contributions

Brian Castro's account was written-off in June 2021.

Mr. Castro is now seeking a refund of his applicable SERS contributions. The Claims Division is requesting the Executive Committee approve reinstatement of Mr. Castro's account so the refund request can be processed.

After reviewing the facts of the case, Executive Secretary Blair moved to approve the request. The motion was seconded by Vice-Chairperson Morris and passed unanimously.

There being no further business to be brought before the Committee, the meeting adjourned at 9:57 a.m.

The next meeting of the Executive Committee is scheduled for March 10, 2022, in the System's Springfield office.

Marvin Becker, Chairperson

David Morris, Vice-Chairperson

Timothy Blair, Executive Secretary