

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

June 14, 2012

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, June 14, 2012, at 8:30 A.M. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee members present:

Loren Iglarsh, Chairman  
Timothy Blair, Executive Secretary  
Lori Laidlaw, Vice Chairperson

Others Present:

Steve Bochenek, Attorney  
Chris Silver, Supervisor, Disability Section  
Michael Noblet, Supervisor, Pension & Death Section  
Kerry Walker, Assistant Supervisor, Disability Section  
Cory Mitchelle, Assistant Supervisor, Pension & Death Section  
Dawn Blakeman, Recording Secretary  
Jill Gordon, Hearing  
Steve Berg, Attorney for Jill Gordon

Minutes of the Previous Meeting

The minutes of the May 10, 2012 meeting of the Executive Committee were presented by Chairman Iglarsh for approval. Copies of the minutes were previously mailed to Committee members for review. There being no additions or corrections, on motion by Vice Chairperson Laidlaw seconded by Executive Secretary Blair and by unanimous vote, the minutes were approved as submitted.

Routine Claims & Denial Report

The Routine Claims and Denials Report for the month of May 2012 were presented for approval. Following review and discussion, Chairman Iglarsh moved acceptance of the Routine Claims and Denials Report for the period of May, 2012. On motion by Chairman Iglarsh seconded by Executive Secretary Blair and by unanimous vote, the minutes were approved as submitted.

Old Business

Robert Ruiz \_\_\_\_\_ Pension

Robert Ruiz requested a personal hearing with the Executive Committee in a letter dated November 19, 2009, regarding the reciprocal agreement be cancelled so he can still collect his pension benefits from the County Employees' Annuity & Benefit Fund of Chicago pension fund.

Mr. Ruiz through a telephone conversation in December, 2011 with Michael Noblet, Supervisor of the Pension and Death Division has requested another hearing continuance. Accordingly, this case continues to be deferred.

David Sharp Pension overpayment

The System's attorney submitted a recommendation to deny based on the facts and findings on file in this case for the Committee's review. Following discussion, on motion by Secretary Blair, seconded by Chairman Iglarsh, and by unanimous vote, the Committee accepted Recommendation No. 2012-04 in the matter of David Sharp.

A copy of this recommendation has been made a part of this member's file.

### New Business

Jill Gordon Non-occupational Disability

Jill Gordon works for a state agency. She began a medical leave of absence on 06/25/10.

Disability benefits were suspended based upon the results of an independent medical examination performed at the Retirement Systems request.

On March 28, 2011, Ms. Gordon participated in an independent medical examination at the Retirement Systems request. Based upon the results of this examination, disability benefits being paid to Ms. Gordon were suspended on June 30, 2011.

Jill Gordon requested a personal appeal pursuant to the suspension of disability benefits.

On May 9, 2011 the file was reviewed by the Retirement Systems Medical Consultant. This review indicated there was no objective evidence of a disability. The Committee agreed to defer this matter at that time in order to obtain additional medical records. On June 20, 2011, SERS medical consultant reviewed the entire file with the new medical information and concluded that the additional information failed to substantiate a disabling condition.

Following discussion, the Committee agreed to refer this matter to the SERS Attorney for a recommendation based on the facts and findings in file for presentation at the next meeting.

The System's attorney submitted a recommendation to deny based on the facts and findings on file in this case for the Committee's review. Following discussion, on motion by Executive Secretary Blair, seconded by Chairman Iglarsh, and by unanimous vote, the Committee accepted Recommendation No. 2011-12 in the matter of Jill Gordon. However, the

file was not sent to the SERS Board to be ratified because Jill Gordon's attorney wished to submit additional information and requested another opportunity to appear.

A hearing was accomplished at this meeting with Ms. Gordon and her attorney, Steve Berg. Additional information was presented at this time. Mr. Berg discussed at length Ms. Gordon's medical and work history.

Following a review of the file and some discussion, Chairman Iglarsh moved that the appeal of Jill Gordon be deferred so that the additional information could be reviewed by SERS medical consultant. After that review the recommendation will be reconsidered based on the new information presented Vice Chairperson Laidlaw seconded the motion, and all were in favor.

Vicki Chambliss

Non-occupational Disability

Vicki Chambliss works for a state agency and a medical leave of absence was granted.

Based upon a review of the file and information submitted, the Committee finds Ms. Chambliss works for a state agency, and was granted a medical leave of absence.

Medical data was obtained from sources listed in the employee's file and then reviewed by the System's medical consultant on May 7, 2012. Based on the information in Vicki Chambliss' file, a disabling condition was not documented. Therefore the request for disability was denied.

Vicki Chambliss requested an appeal pursuant to the denial of disability benefits.

Based on the facts of this case and information submitted, the Committee recommends deferring the appeal of Vicki Chambliss until additional information can be obtained and reviewed by the system's medical consultant.

Letitia Chappell

Non-occupational Disability

Letitia Chappell works for a state agency and a medical leave of absence was granted on 10/03/2009.

Ms. Chappell's disability benefit was suspended on 02/29/2012 based on the results of an independent medical evaluation on 12/21/2011 and medical data from treating sources listed in file.

Based upon a review of the file and information submitted, the Committee finds Letitia Chappell works for a state agency, and was granted a medical leave of absence.

Medical data was obtained from sources listed in the employee's file. On 12/21/11 the employee participated in an independent medical evaluation at the System's request. Based on the results of the independent medical evaluation and the medical data from the treating sources, disability benefits were suspended.

Ms. Chappell requested an appeal pursuant to the denial of disability benefits. Additional information was received with the appeal request. Ms. Chappell is also questioning the job duty description that was submitted to SERS on 12/8/2009. For clarification purposes, SERS submitted a new job duty description form to her supervisor. The form was completed on 05/15/2012.

On 05/24/2012, her entire file was reviewed by the System's medical consultant. Based on information in file, a disabling condition was not documented beyond 02/29/2012.

Ms. Chappell is questioning the job duty statement supplied by her agency. Therefore she will be given the opportunity to review the Job duty statement supplied to the System and make changes to the points she disagrees with.

It will be explained that the original job duty statement and her comment would be forwarded to his retirement coordinator to obtain clarification.

Following a review of the file and some discussion, Chairman Iglarsh moved that the appeal of Letitia Chappell be deferred so additional information can be submitted. Trustee Laidlaw seconded the motion, and all were in favor.

Jon Benecke Occupational Disability/12 month

Jon Benecke's claim for disability benefits was denied due to failure to apply for occupational disability benefits within the proper time frame.

Based upon a review of the file and information submitted, the Committee finds Jon Benecke works for a state agency and a service connected leave of absence was granted.

Mr. Benecke requested a written appeal pursuant to the denial of disability benefits due to late filing. Information was received with the appeal request which lists the reasons the employee failed to file on a timely basis.

Based on the facts of this case and information submitted, Executive Secretary Blair moved approval of the appeal of Jon Benecke for a waiver of the twelve month filing time limit for occupational disability. Vice Chairperson Laidlaw seconded the motion, and all were in favor.

Medical Consultant Request for ID number

SERS Medical Consultants have expressed concerns about having their names on medical reports for members who are evaluated for disability benefits through SERS. Due to privacy concerns they are requesting to be identified as "Medical Consultant 105 & 110".

The Executive Secretary Blair expressed the Executive Committees concerns and agreed to defer so additional information can be obtained. Vice Chairperson Laidlaw seconded the motion, and all were in favor.

This account became eligible for write-off in June, 2006. Contributions in the amount of \$12,967.36 and widow and survivors in the amount of \$1,620.06 and 101 months of creditable service were written off on June 23, 2006. Ms. Larson has contacted SERS office with a new address and proper identification.

The Service and Refunds Division is requesting the Executive Committee to approve the reinstatement of this account.

Following a review of the file and some discussion, Chairman Iglarsh moved approval of the appeal of Patricia Lawson request for reinstatement of her account. Vice Chairperson Laidlaw seconded the motion and all were in favor.

This account became eligible for write-off in June, 2006. Contributions in the amount of \$4,929.39 were written off on June 23, 2006. Ms. Osegera has contacted SERS with the proper identification and address regarding her account and eligibility for a refund.

The Service and Refunds Division is requesting the Executive Committee to approve the reinstatement of this account so that a future pension may be paid.

Following a review of the file and some discussion, Executive Secretary Blair moved approval of the appeal of Cheryl L. Osegera request for reinstatement of her account. Chairman Iglarsh seconded the motion and all were in favor.

Anna Fisher's claim for disability benefits was denied due to failure to apply for occupational disability benefits within the proper time frame.

Based upon a review of the file and information submitted, the Committee finds Anna Fisher works for a state agency and a service connected leave of absence was granted.

Ms. Fisher requested a written appeal pursuant to the denial of disability benefits due to late filing. Information was received with the appeal request which lists the reasons the employee failed to file on a timely basis.

Based on the facts of this case and information submitted, Chairman Iglarsh moved approval of the appeal of Anna Fisher for a waiver of the twelve month filing time limit for occupational disability. Vice Chairperson Laidlaw seconded the motion, and all were in favor

Teresa Hurley works for a state agency and a medical leave of absence was granted on January 21, 2012.

Based upon a review of the file and information submitted, the Committee finds Teresa Hurley works for a state agency, and was granted a medical leave of absence.

Medical documentation was obtained from medical sources listed in the employee's file. This documentation was reviewed by the System's medical consultant on April 12, 2012. The results of this review indicated the medical documentation failed to substantiate a disabling impairment prior to February 5, 2012. Therefore, the request for disability was denied for the period of 01/15/2012 through 02/5/2012.

She has requested an appeal pursuant to the denial of disability benefits. She is requesting disability benefits for after her thirty day waiting period.

The entire file was reviewed by the System's Medical Consultant on April 12, 2012.

After some discussion and a review of the information, Executive Secretary Blair recommended the appeal be approved for the period of 02/06/2012 through 03/12/2012 and denied, for the period of 01/15/12 through 02/05/2012. Chairman Iglarsh seconded the motion and all were in favor.

#### Juan Rodriguez

#### Retirement Annuity

Juan Rodriguez began receiving his retirement annuity effective 04/01/2010. As of December 31, 2011, his benefit was suspended, following the conviction of a felony arising out of his duties as a state employee.

Mr. Rodriguez is requesting in a written appeal that the Executive Committee reinstate his pension.

It was noted File No. 11-004 from the Office of The Attorney General:

Section 14-149 of the Pension Code provides, with respect to members of the State Employees' Retirement System:

Felony conviction: None of the benefits herein provided for shall be paid to any person who is convicted of any felony relating to or arising out of or in connection with his service as an employee.

After discussion and following a review of the file, the Committee agreed to deny Juan Rodriguez's appeal for reinstatement. Vice Chairperson Laidlaw moved to deny the written appeal of Juan Rodriguez and approve the termination of pension benefits. Executive Secretary Blair seconded the motion and all were in favor.

In a letter dated June 1, 2012 Mr. Rodriguez is requesting the Executive Committee approve a re-appeal of the denial.

Following a review of the file and some discussion, Executive Secretary Blair moved to deny the re-appeal of Juan Rodriguez for reinstatement of pension benefits due

to a felony conviction, Vice Chairperson Laidlaw seconded the motion and all were in favor.

There being no further business to be brought before the Committee, the meeting was adjourned at 10:45AM. The next meeting of the Executive Committee is scheduled for Thursday July 12, 2012, in the Springfield office, with video conferencing in Chicago if needed.

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Loren Iglarsh  
Chairman

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Lori Laidlaw  
Vice Chairperson

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Timothy Blair  
Executive Secretary