



MINUTES

**Quarterly Meeting of the Administration Committee
of the Board of Trustees of the
State Universities Retirement System
Thursday, September 7, 2023, at 12:30 p.m.
The State Universities Retirement System
1901 Fox Drive, Champaign, IL
*Optional Remote Connection for Members of the Public***

This meeting was held in person at the State Universities Retirement System in Champaign, IL.

The following trustees were present: Mr. John Atkinson (via zoom), Dr. Andriy Bodnaruk (via zoom), Mr. Richard Figueroa (via zoom), Ms. Jamie-Clare Flaherty, Dr. Fred Giertz, Mr. Scott Hendrie, Mr. John Lyons, Dr. Steven Rock, Mr. Antonio Vasquez, and Mr. Mitch Vogel.

Others present: Ms. Suzanne Mayer, Executive Director; Mr. Douglas Wesley, Chief Investment Officer (CIO); Ms. Ellen Hung, Deputy CIO; Ms. Tara Myers, Chief Financial Officer; Mr. Shane Willoughby, Sr. Investment Officer; Ms. Bianca Green, General Counsel; Ms. Nichole Hemming, Chief Human Resources Officer; Mr. Albert Lee, Associate General Counsel; Ms. Heather Kimmons, Associate Legal Counsel; Ms. Anna Dempsey, Investment Counsel; Ms. Stephanie Brinkman, Investments; Ms. Jackie Hohn, Director of Internal Audit, Mr. Alex Deal, Internal Auditor, Ms. Kristen Houch, Director of Legislative and Stakeholder Relations; Ms. Alicia Route, Legislative Analyst; Mr. Jefferey Saiger, Chief Technology Officer; Ms. Leslie Pouilliard, Project Manager; Mr. Stewart McGill, Project Manager; Ms. Kelly Carson, Ms. Chelsea McCarty and Ms. Annette Ackerman, Executive Assistants; Mr. Brian Murphy, Mr. Kevin Noelke, and Ms. Kristen Brundirks of GRS; Ms. Erica Oropeza, Ms. Jennifer Concepcion, and Mr. Bryce Haws of Linea; Ms. Catherine Dietrich and Mr. Darren Spindel of Vitech; Ms. Alica DeVore and Mr. Matt Swaffer of MBS; Mr. Tom Walsh of Ice Miller; and Mr. Michael Calabrese of Foley.

Administrative Committee roll call attendance was taken. Trustee Flaherty, present; Trustee Rock, present; Trustee Vasquez, present.

TRUSTEE PARTICIPATION VIA ELECTRONIC MEANS

Trustee Rock made the following motion:

- That Trustee Atkinson be allowed to participate via video or conference call for the Administration committee meeting on September 7, 2023, pursuant to Section 7(a) of the Open Meetings Act.

Trustee Vasquez seconded the motion which passed via the following roll call vote:

Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Vazquez	-	aye

APPROVAL OF MINUTES

Trustee Atkinson presented the minutes from the Administration Committee meeting of June 2, 2023.

Trustee Rock made the following motion:

- That the minutes from the June 2, 2023 Administration Committee meeting be approved as presented.

Trustee Vasquez seconded the motion which passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Van Meter	-	absent
Trustee Vasquez	-	aye

APPROVAL OF CLOSED MINUTES

Trustee Atkinson presented the closed minutes from the Administration Committee meeting of June 2, 2023.

Trustee Rock made the following motion:

- That the minutes from the June 2, 2023 Administration Committee meeting be approved as presented and remain closed.

Trustee Vasquez seconded the motion which passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Van Meter	-	absent
Trustee Vasquez	-	aye

CHAIRPERSON'S REPORT

There was no formal chairperson's report.

REVIEW OF THE ECONOMIC ASSUMPTIONS

Mr. Brian Murphy, Ms. Amy Williams, Mr. Kevin Noelke, and Ms. Kristen Brundirks of GRS presented the SURS 2023 Economic Assumption Review to the SURS Board of Trustees and provided their feedback and recommendations going forward.

A copy of the GRS presentation titled “SURS Economic Assumption 2023” is incorporated as part of these minutes as [Exhibit 1](#).

APPROVAL OF OVERPAYMENT WRITE-OFFS

Ms. Tara Myers reviewed SURS Joint Committee on Administrative Rule (JCAR) 80 I11. Adm. Code 1600.450 which established the procedures for SURS to use to recover amounts overpaid to SURS annuitants. If an overpayment is deemed uncollectible, SURS staff may ask the board to approve a write-off of the overpayment balance, so it is no longer reflected in the accounts receivable ledger. Ms. Tara Myers and Ms. Jennifer Bartell reviewed the overpayments staff certified as being uncollectible and then opened the floor for questions from the board.

Trustee Flaherty made the following motion:

- That based on the recommendation of SURS staff, the benefit overpayments certified as uncollectible in accordance with 80 I11. Adm. Code Section 1600.450 in the amount of \$221,782.95 be written off.

Trustee Vasquez seconded the motion which passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Van Meter	-	absent
Trustee Vasquez	-	aye

A copy of the staff memorandum titled “Certification of Write-off of Benefit Overpayments” and a copy of the staff supporting document titled “More Supporting Documents” has been incorporated as part of these minutes as [Exhibit 2](#) and [Exhibit 3](#).

QUARTERLY PENSION ASSESSMENT SYSTEM (PAS) UPDATE AND PROPOSED PROJECT CHANGE ORDERS

Mr. Jefferey Saiger introduced Ms. Erica Oropeza of Linea who delivered the quarterly Pension Assessment System (PAS) update including updates regarding the overall project status, project proposal extensions, change orders and vendor presentations. Mr. Saiger reviewed the project challenges that were discussed during the June committee meeting. Trustees asked questions of the representatives from Vitech, Linea and MBS.

A copy of the Linea Solutions presentation titled “SURS Project Velocity Update” has been incorporated as part of these minutes as [Exhibit 4](#). A copy of the staff memorandum titled “Project Velocity Update” has been incorporated as part of these minutes as [Exhibit 5](#).

CLOSED SESSION

Trustee Rock moved that the Administrative Committee go into closed session pursuant to §2(c)(11) of the Illinois Open Meetings Act to discuss litigation, when an action against, affecting or on behalf of the particular public body has been filed and is pending before a court or administrative tribunal, or when the public body finds that an action is probable or imminent. Trustee Flaherty seconded the motion which passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Van Meter	-	absent
Trustee Vasquez	-	aye

RETURN TO OPEN SESSION

The Administration Committee returned to open session at 3:33 p.m.

Trustee Vasquez made the following motion:

- That based on the recommendation of SURS staff, the suggested Project Velocity additional costs in the amount of \$400,000.00 be approved for the SURS PAS project to be included in the FY 24 budget to cover new costs incurred before the end of FY24 for the changes required by Senate Bill 1235, the same of which shall be included in a written change order with Vitech that will be subject to successful completion of contract negotiations.

Trustee Flaherty seconded the motion which passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Van Meter	-	absent
Trustee Vasquez	-	aye

PUBLIC COMMENT

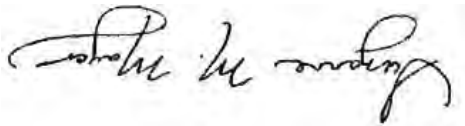
There was no public comment presented to the Administration Committee.

ADJOURN

There was no further business brought before the committee and Trustee Flaherty moved that the meeting be adjourned. The motion was seconded by Trustee Rock, and it passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Flaherty	-	aye
Trustee Rock	-	aye
Trustee Van Meter	-	absent
Trustee Vasquez	-	aye

Respectfully submitted,



Ms. Suzanne M. Mayer
Executive Director and Secretary, Board of Trustees



State Universities Retirement System of Illinois

2023 Economic Assumption Review

Amy Williams, ASA, MAAA, FCA

Brian B. Murphy, FSA, EA, MAAA, FCA, PhD

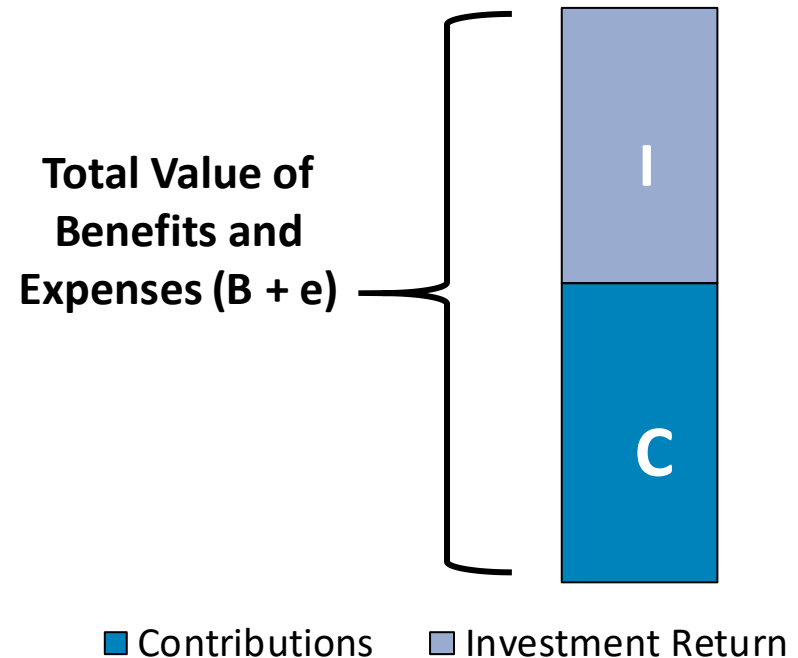
September 2023



Funding Equation

- Over time, there are three main pieces of the actuarial funding equation:

$$C + I = B + e$$



— Where:

- C = Contributions
- I = Investment Return
- $B + e$ = Benefits and Expenses

How Assumptions Factor in...

- Actual experience determines the cost of benefits
- Assumptions help us develop a reasonable starting point for decision making today
- The cost of benefits
 - Is NOT affected by actuarial assumptions or methods
 - IS determined by actual participant behavior (termination, retirement, etc.), plan provisions and actual investment and other experience

Economic Assumptions

- Each economic assumption is set based on price inflation and an amount in excess of price inflation
- The following table summarizes the economic assumptions used in the actuarial valuation as of June 30, 2022

	Current Assumption
Price Inflation	2.25%
Real Return	4.25%
Investment Return	6.50%
Prescribed Rate of Interest (for money purchase factors)	6.50%
Effective Rate of Interest (for interest crediting on money purchase balances)	6.50%
Base Salary Increase/Payroll Growth	3.00%
COLA for Tier 2	1.125%

Per ASOP 27: Reasonable Assumptions

- An economic assumption is reasonable if:
 - It is appropriate for the purpose of the measurement
 - It reflects the *actuary's* professional judgment
 - It takes into account historical and current economic data that is relevant as of the measurement date
 - It reflects the *actuary's* estimate of future experience
 - It has no significant bias (i.e., it is not significantly optimistic or pessimistic)
 - Although some allowance for adverse experience may be appropriate
- The standard advises an actuary not to give undue weight to recent experience
- The actuary may incorporate the views of experts, but the assumption should reflect the *actuary's* professional judgment

Inflation Assumption

- The price inflation assumption is currently 2.25%
- For us, it is a building block for the investment return assumption

$$\text{Total Investment Return} = \text{Real Return} + \text{Price Inflation}$$

- So if the inflation assumption is raised or lowered, the investment return assumption may need to be raised or lowered by an equal amount if the real return is not intended to be changed

Forward Looking Inflation Forecasts at June 30, 2023

Congressional Budget Office	
5-Year Annual Average	2.83%
10-Year Annual Average	2.57%
Federal Reserve Bank of Philadelphia	
5-Year Annual Average	2.50%
10-Year Annual Average	2.36%
Federal Reserve Bank of Cleveland	
10-Year Expectation	1.66%
20-Year Expectation	1.88%
30-Year Expectation	2.05%
Federal Reserve Bank of St. Louis	
10-Year Breakeven Inflation	2.20%
20-Year Breakeven Inflation	2.48%
30-Year Breakeven Inflation	2.23%
U.S. Department of the Treasury	
10-Year Breakeven Inflation	2.10%
20-Year Breakeven Inflation	2.40%
30-Year Breakeven Inflation	2.19%
50-Year Breakeven Inflation	2.29%
100-Year Breakeven Inflation	2.37%
Social Security Trustees	
Ultimate Intermediate Assumption	2.40%

Based upon this data, the current price inflation assumption (2.25%) remains reasonable.

Historical Forward-Looking Inflation Forecasts

	6/30/2020	6/30/2021	6/30/2022	6/30/2023
Congressional Budget Office				
5-Year Annual Average	2.46%	2.18%	3.23%	2.83%
10-Year Annual Average	2.38%	2.29%	2.81%	2.57%
Federal Reserve Bank of Philadelphia				
5-Year Annual Average	2.00%	2.40%	3.40%	2.50%
10-Year Annual Average	2.14%	2.30%	2.80%	2.36%
Federal Reserve Bank of Cleveland				
10-Year Expectation	1.23%	1.60%	2.40%	1.66%
20-Year Expectation	1.58%	1.82%	2.41%	1.88%
30-Year Expectation	1.81%	2.00%	2.45%	2.05%
Federal Reserve Bank of St. Louis				
10-Year Breakeven Inflation	1.18%	2.34%	2.62%	2.20%
20-Year Breakeven Inflation	1.55%	2.43%	2.78%	2.48%
30-Year Breakeven Inflation	1.55%	2.29%	2.47%	2.23%
U.S. Department of the Treasury				
10-Year Breakeven Inflation	1.24%	2.36%	2.44%	2.10%
20-Year Breakeven Inflation	1.41%	2.39%	2.60%	2.40%
30-Year Breakeven Inflation	1.71%	2.41%	2.40%	2.19%
50-Year Breakeven Inflation	1.84%	2.45%	2.50%	2.29%
100-Year Breakeven Inflation	1.93%	2.48%	2.57%	2.37%
Social Security Trustees				
Ultimate Intermediate Assumption	2.40%	2.40%	2.40%	2.40%

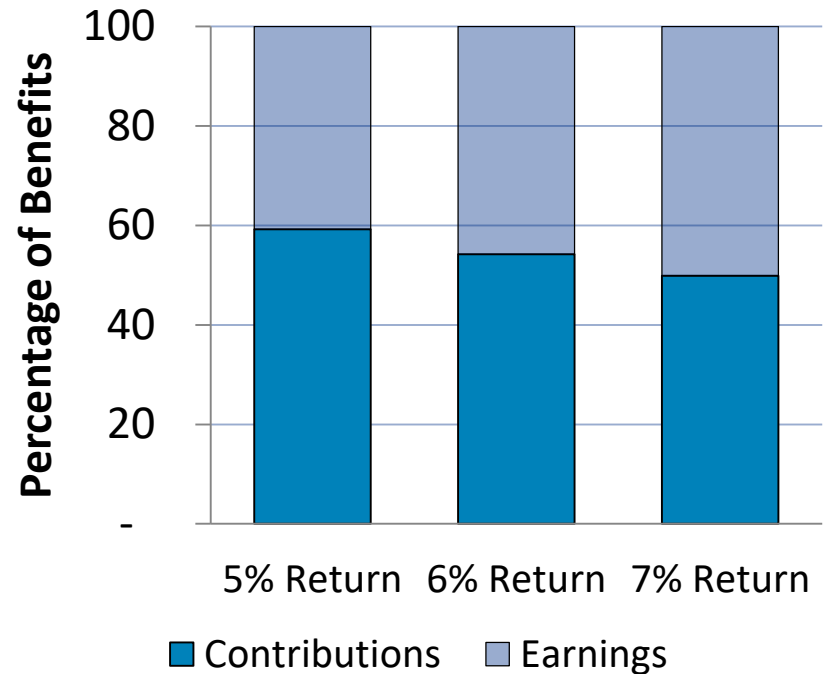
Inflation forecasts have declined almost uniformly since June 2022.

Inflation Recommendation

- Maintain the current 2.25% assumption
- The inflation assumption is reviewed annually (and will be reviewed as part of the full experience study that will be conducted after the 2023 actuarial valuation)
- The change in CPI from June 2022 to June 2023 was about 3%
 - Although rates are still above the current assumption, they have declined materially since they peaked in 2022. The Federal Reserve Target remains at 2%, and the Fed has undertaken actions intended to reduce rates down to the target.

Investment Return Assumption

- This assumption is used to predict what percentage of future benefit payments will be covered by investment return and what percentage by contributions
- Lower returns require higher contributions and higher returns require lower contributions



Setting the Investment Return Assumption

Risk Tolerance



Asset Allocation



Investment Return Assumption

Asset Allocation Information from Meketa

Classes/Strategies	Policy Targets (%)	
	Current	Long-term
BROAD GROWTH	68.0	68.0
Traditional Growth	37.0	35.0
Public Equity	37.0	35.0
Stabilized Growth	17.0	17.0
Core Real Assets	8.0	8.0
Options Strategies	0.0	0.0
Liquid Credit	7.5	4.0
Private Credit	1.5	5.0
Non-Traditional Growth	14.0	16.0
Private Equity	11.0	11.0
Non-Core Real Assets	3.0	5.0
INFLATION SENSITIVE	5.0	5.0
PRINCIPAL PROTECTION	10.0	10.0
CRISIS RISK OFFSET	17.0	17.0
Long U.S. Treasuries	2.0	2.0
Systematic Trend Following	10.0	10.0
Alternative Risk Premia	3.0	3.0
Long Volatility	1.7	1.7
Tail Risk	0.3	0.3
Total	100.0	100.0
Annual Volatility	10.8	11.0
Expected Return (10-year)	7.2	7.3
Expected Return (20-year)	7.8	8.0

- In an April 20, 2023 Communication to the Board, Meketa reported that the SURS's investment portfolio is well structured to perform in-line with or above its 6.50% actuarial objective over the long term.
- We analyzed the portfolios with our own model. This provides the Board additional assurance regarding portfolio expectations and enables us to meet our own professional requirements.

The "current policy" is expected to change over time, evolving toward and actually becoming the long-term policy within the next few years.



GRS Analysis

- GRS does not provide investment advice and does not develop its own capital market assumptions (“CMAs”)
- GRS collected CMAs from 12 different investment consulting firms
- GRS considers the views of the plan’s consultant and compares them with the views of the 12 investment firms

Firms and Time Horizons in the GRS Analysis

- Aon Hewitt, Blackrock, BNY Mellon, Callan, Cambridge, JPMorgan, *Meketa* (the SURS Consultant), Mercer, NEPC, RVK, Verus and Wilshire
- 11 firms provided shorter-term CMAs (most were 10-year time horizons)
- Three provided CMAs based on 20-year horizons
- Four provided CMAs based on 30-year horizons
- GRS then mapped the SURS asset allocations into the CMAs of each firm

Modeling Results

		Meketa				GRS Capital Market Assumption Modeler	
		2023 Allocation and Expectations		2022 Allocation and Expectations		2023 Allocation and Expectations	2022 Allocation and Expectations
		Geo. Return	Volatility	Geo. Return	Volatility	Probability of Exceeding 6.50%	
Current Allocation	10 year	7.20%		5.60%		52%	38%
	20 Year	7.80%	10.80%	6.50%	11.50%	57%	51%
Long-Term Allocation	10 year	7.30%		6.00%		53%	41%
	20 Year	8.00%	11.00%	6.90%	11.50%	58%	55%

- Modeling results shown above are based on current (2023) capital market assumptions and asset allocation and last year's (2022) capital market assumptions and asset allocation.
- 2023 capital market assumptions are significantly higher compared to the past few years (on average more than 1% higher).
- An optimal assumption would have a probability close to or above 50% over both the 10- and 20-year horizons. (Based on the 2023 capital market assumptions, the current assumption of 6.50% achieves this.)
- GRS figures are normalized to a 2.25% inflation assumption. The average inflation assumption of the investment firms who provided CMAs is 2.52%.

Average Geometric Expectations by CMAM Year

Historical CMAM	Distribution of Geometric Net Nominal Return Based on 2.25% Underlying Inflation			Probability of Exceeding 6.50%
	40th	50th	60th	
Current Target -- 10 Year Expectations				
2021 CMA	4.46%	5.32%	6.19%	37%
2022 CMA	4.28%	5.14%	6.01%	35%
2023 CMA	5.79%	6.67%	7.55%	52%
Average from last 3 CMAMs	4.84%	5.71%	6.59%	41%

These expectations are based on the SURS 2023 Current Target asset allocation and the capital market assumptions from the 2021, 2022 and 2023 GRS Capital Market Assumption Modeling tool. The amounts shown above are averages of the results from the firms included in the CMAM tool for the given year.

Investment Return Recommendation

- We recommend maintaining the current 6.50% assumption
 - Based on the 2023 capital market assumptions, the 6.50% assumption has just over a 50% probability of being achieved (which is optimal)
 - We caution against changing the assumption (both upward and downward changes) in reaction to a significant change in capital market assumptions from one year to the next
- We will evaluate as part of the full experience study next year

Disclaimers

- This presentation should not be relied on for any purpose other than the purpose described herein.
- This presentation shall not be construed to provide tax advice, legal advice or investment advice.
- Readers are cautioned to examine original source materials and to consult with subject matter experts before making decisions related to the subject matter of this presentation.
- This presentation expresses the views of the authors and does not necessarily express the views of Gabriel, Roeder, Smith & Company.

Disclaimers

- Future actuarial measurements may differ significantly from the current and projected measurements presented in this presentation due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period or additional cost or contribution requirements based on the plan's funded status); and changes in plan provisions or applicable law.
- If you need additional information to make an informed decision about the contents of this presentation, or if anything appears to be missing or incomplete, please contact us before relying on this presentation.
- The actuaries submitting this presentation (Amy Williams and Kevin Noelke) are Members of the American Academy of Actuaries and meet the Qualification Standards of the American Academy of Actuaries to render the actuarial opinion contained herein.



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To: Administration Committee
From: Tara Myers, CFO and Jennifer Bartell, Senior Claims Manager
Date: August 18, 2023
Re: Certification of Write-off of Benefit Overpayments

Overview

The Joint Committee on Administrative Rules 80 Ill. Adm. Code §1600.450 established the procedures by which the State Universities Retirement System (SURS) may recover amounts overpaid from SURS annuitants. If SURS is unable to collect all, or part, of an overpayment, SURS staff may request that the Board certify the overpayment balance as uncollectible and as a result, no longer maintain the balance as an account receivable on SURS records.

For Fiscal Year 2023 SURS collected \$3,691,191.11 that was applied to outstanding overpaid benefits. This amount does include \$45,766.81 that was recovered from IDROP and \$6,164.66 that was recovered from unclaimed property with the State of Illinois Treasurer's Office. Recovering money from unclaimed property is a new option that was added to our process in October of 2021.

The attached list represents benefit overpayments made to SURS members and survivors, most of which are deceased. Staff has attempted to collect the overpayments by requesting the return of electronic fund transfers made to the decedent's bank account, recovering from any death or survivor benefits payable, listing the outstanding amount on IDROP, collecting on any unclaimed property with the State of Illinois Treasurer's Office, and through correspondence to the member or surviving heirs. SURS staff's attempts to collect these overpayments have been unsuccessful. The amounts shown represent the balance after the previously mentioned adjustments. There are no further benefits payable from the System from which the overpayment can be collected.

In accordance with Joint Commission on Administration (JCAR) Section 1600.450, an overpayment balance that is over \$100 but less than \$5,000 and uncollectible after 12 months or an overpayment balance that is greater than \$5,000 and uncollectible after 36 months, the overpayment may be certified as uncollectible by the SURS staff and certified by the Board. The items on the attached list meet one of these criteria.

Recommendation:

SURS staff recommend that the benefit overpayments being presented be certified as uncollectible in accordance with 80 Ill. Adm. Code §1600.450 and the amount of \$221,782.95 be written off.

Name	Date Overpayment was Created	Amount	Explanation
Alfred, Rebecca	9/10/2020	\$2,393.21	Survivor passed on 8/25/2020. SURS was notified of the death on 9/04/2020. A letter to the estate was sent on 10/06/2020 requesting the return of the September 2020 annuity payments for a total overpayment of \$2,393.21, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 4/16/2021 and overpayment was posted to IDROP on 5/25/21. No money has been recovered to date.
Applegate, Donna	04/20/2020	\$483.66	Member passed on 3/18/2020. SURS was notified of the death on 4/15/2020. A letter to the estate was sent on 6/02/2020 requesting the return of the April 2020 annuity payment for a total overpayment of \$1,483.66, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. No money has been recovered to date.
Aurel, Marie	2/07/2020	\$3,075.52	Member passed on 1/27/2020. SURS was notified of the death on 2/06/2020. A letter to the estate was sent on 2/13/2020 requesting the return of the February 2020 annuity payment for a total overpayment of \$4,186.47, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. SURS was able to collect \$110.95 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Barba, Maria	1/29/2019	\$24,176.30	Member passed on 9/13/2018. SURS was notified of the death on 1/23/2019. A letter to the estate was sent on 2/12/19 requesting the return of the October, November, December 2018 and the January 2019 annuity payments for a total overpayment of \$25,176.30, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. No money has been recovered to date.
Bardis, Julia	5/08/2019	\$5,263.80	Member passed on 4/26/2019. SURS was notified of the death on 5/06/2019. A letter to the estate was sent on 05/21/2019 requesting the return of the May 2019 annuity payment for a total overpayment of \$6,263.80, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. No money has been recovered to date.
Berger, Michael	2/17/2021	\$1,702.70	Member passed on 1/21/2021. SURS was notified of the death on 2/11/2021. A letter to the estate was sent on 5/04/2021 requesting the return of the February 2021 annuity payment for a total overpayment of \$2,702.70, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on

			1/06/2022. Overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Brannon, Donald	4/06/2020	\$1,075.65	Survivor passed on 3/27/2020. SURS was notified of the death on 4/01/2020. A letter to the estate was sent on 5/18/2020 requesting the return of the April 2020 annuity payments for a total overpayment of \$1,106.63, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 4/16/2021 and overpayment was posted to IDROP on 5/25/21. SURS was able to collect \$30.98 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Burwell, Donna	12/15/2020	\$1,575.47	Survivor passed on 11/26/2020. SURS was notified of the death on 12/08/2020. A letter to the estate was sent on 7/29/2021 requesting the return of the December 2020 annuity payment for a total overpayment of \$1,575.47, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/06/2022 and overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Butz, Dixianna	12/15/2020	\$1,028.09	Member passed on 11/29/2020. SURS was notified of the death on 12/09/2020. A letter to the estate was sent on 03/08/2021 requesting the return of the December 2020 annuity payment for a total overpayment of \$2,028.09, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/06/2022. Overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.
Canary, Marcia	11/06/2020	\$4,031.70	Member passed on 10/18/2020. SURS was notified of the death on 11/04/2020. A letter to the estate was sent on 12/01/2020 requesting the return of the November 2020 annuity payment for a total overpayment of \$5,031.70, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. No money has been recovered to date.
Cavitt, Tyrone	8/01/2014	\$14,644.68	Member passed on 8/07/2020. SURS was notified of the death on 9/13/2020. A letter to the estate was sent on 11/12/2020 requesting the return of the September 2020 annuity payment for a total overpayment of \$1,308.37, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Prior to the members death, in 2012 an overpayment was created due to the member receiving SURS disability benefits and a workers compensation settlement. SURS sent a letter to the member on 8/14/2012 informing him of the overpayment of \$51,740.39. The member did appeal this decision and On 3/13/2013, in the review by Angie Lieb, Director of Member Services, she informed him that the original amount of the overpayment was understated that the correct amount was \$59,837.21. The member participated in a hearing with SURS claim panel. The member's appeal was denied and the Staffs decision on the overpayment amount was final. SURS was withholding \$623.30 a month from the members retirement benefits starting 8/01/2014 until 8/01/2020 (members death). A total amount of \$46,500.90 was collected from these monthly payments. Final attempt letter was sent on

			2/21/2022. Overpayment was posted to IDROP on 4/12/2022. No additional money has been recovered to date.
Chapman, Gregory	4/03/2018	\$8,635.43	Member passed on 1/22/2018. SURS was notified of the death on 3/29/2018. A letter to the estate was sent on 7/12/2018 requesting the return of the February, March, April 2018 annuity payments for a total overpayment of \$9,635.43, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. No money has been recovered to date.
Coleman, Ola	5/11/2020	\$212.69	Member passed on 4/13/2020. SURS was notified of the death on 5/05/2020. A letter to the estate was sent on 12/07/2020 requesting the return of the May 2020 annuity payment for a total overpayment of \$1,212.69, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 12/20/2021. No money has been recovered to date.
Cunningham, Clark	5/11/2020	\$6,413.15	Member receiving survivor and retirement benefits, passed on 4/18/2020. SURS was notified of the death on 5/06/2020. A letter to the estate was sent on 6/01/2020 requesting the return of the May 2020 annuity payments for a total overpayment of \$7,413.15, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/16/2021. Overpayment was posted to IDROP on 5/25/2021. No money has been recovered to date.
Davis, Mae	12/15/2020	\$300.68	Member passed on 11/27/2020. SURS was notified of the death on 12/10/2020. A letter to the estate was sent on 2/16/2021 requesting the return of the December 2020 annuity payment for a total overpayment of \$1,513.41, but no response or remittance has been received. The bank was only able to return \$212.73. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/06/2022. Overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Decker, Lillian	2/26/2019	\$13,565.04	Survivor passed on 9/28/2018. SURS was notified of the death on 2/22/2019. A letter to the estate was sent on 4/22/2019 requesting the return of the October, November, December 2018 and January, February 2019 annuity payments for a total overpayment of \$13,565.04, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 4/23/2021 and overpayment was posted to IDROP on 6/03/2021. No money has been recovered to date.

Downings, Adalyne	5/11/2021	\$218.15	Survivor passed on 3/16/2021. SURS was notified of the death on 5/04/2021. A letter to the estate was sent on 8/04/2021 requesting the return of the April 2021 annuity payment for a total overpayment of \$218.15, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/06/2022 and overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Duda, James	1/31/2020	\$723.48	Member passed on 12/22/2019. SURS was notified of the death on 1/28/2020. A letter to the Clerk of Circuit Court of Sangamon County was sent on 2/21/2020 requesting the return of the January 2020 annuity payment for a total overpayment of \$1,723.48, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 5/12/2021. Overpayment was posted to IDROP on 6/24/2021. No money has been recovered to date.
Dunn El, Earline	7/20/2020	\$749.03	Member passed on 6/12/2020. SURS was notified of the death on 7/14/2020. A letter to the estate was sent on 9/21/2020 requesting the return of the July 2020 annuity payment for a total overpayment of \$1,749.03, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/23/2021. Overpayment was posted to IDROP on 6/03/2021. No money has been recovered to date.
Duxbury, Mitzi	3/13/2020	\$1,362.12	Member passed on 2/01/2020. SURS was notified of the death on 3/12/2020. A letter to the estate was sent on 5/12/2020 requesting the return of the March 2020 annuity payment for a total overpayment of \$2,362.12, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/23/2021. Overpayment was posted to IDROP on 6/03/2021. No money has been recovered to date.
Epps, William	5/27/2020	\$301.79	Survivor passed on 4/27/2020. SURS was notified of the death on 5/20/2020. A letter to the estate was sent on 7/28/2020 requesting the return of the May 2020 annuity payment for a total overpayment of \$301.79, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 4/23/2021 and overpayment was posted to IDROP on 6/03/2021. No money has been recovered to date.
Feliciano, Gladys	8/10/2021	\$1,140.65	Survivor passed on 7/28/2021. SURS was notified of the death on 8/09/2021. A letter to the estate was sent on 8/25/2021 requesting the return of the August 2021 annuity payment for a total overpayment of \$1,140.65, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/13/2022 and overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Fenton, Sally	8/13/2020	\$537.57	Survivor passed on 7/16/2020. SURS was notified of the death on 8/06/2020. A letter to the estate was sent on 7/28/2021 requesting the return of the August 2020 annuity payment for a total overpayment of \$537.57, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/13/2022 and

			overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Franklin, David	11/18/2020	\$1,561.12	Survivor passed on 9/16/2020. SURS was notified of the death on 11/14/2020. A letter to the estate was sent on 7/29/2021 requesting the return of the October and November 2020 annuity payment for a total overpayment of \$1,561.12, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/13/2022 and overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Griffith, Patsy	8/21/2020	\$1,081.78	Survivor passed on 7/30/2020. SURS was notified of the death on 8/20/2020. A letter to the estate was sent on 10/06/2020 requesting the return of the August 2020 annuity payment for a total overpayment of \$1,081.78, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 5/24/2021 and overpayment was posted to IDROP on 7/23/2021. No money has been recovered to date.
Haidu, Peter	6/15/2018	\$18,841.64	Member passed on 2/07/2017. SURS was notified of the death on 6/13/2018. A letter to the estate was sent on 8/09/2018 requesting the return of the March – September 2017 annuity payments for a total overpayment of \$19,841.64, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/23/2021. Overpayment was posted to IDROP on 6/03/2021. No money has been recovered to date.
Harnack, Robert	5/11/2018	\$8,394.15	Member passed on 3/24/2018. SURS was notified of the death on 5/10/2018. A letter to the estate was sent on 6/26/2018 requesting the return of the April 2018 annuity payment for a total overpayment of \$9,394.15, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/30/2021. Overpayment was posted to IDROP on 6/16/2021. No money has been recovered to date.
Hess, Josh	9/06/2019	\$12,994.02	Member was overpaid on his disability benefits due to an offset for receiving a workers compensation settlement. The member took a separation refund from SURS on 8/23/2018, prior to the letter that was sent to the member on 12/4/2019 informing him how the offset was calculated and the amount of the overpayment \$11,769.22, but no response or remittance was sent. Monthly billing statements and interest charges began on 8/15/2020. A final attempt letter was sent on 9/23/2021. Overpayment was posted to IDROP on 11/05/2021. No money has been recovered to date.
Howard, Marion	2/07/2020	\$953.67	Member passed on 1/25/2020. SURS was notified of the death on 2/06/2020. A letter to the estate was sent on 2/13/2020 requesting the return of the February 2020 annuity payment for a total overpayment of \$1,963.67, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/30/2021. Overpayment was posted to IDROP on 6/16/2021. SURS was

			able to collect \$10.00 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Johnson, Marian	11/04/2020	\$337.81	Survivor passed on 10/14/2020. SURS was notified of the death on 10/30/2020. A letter to the estate was sent on 7/29/2021 requesting the return of the November 2020 annuity payment for a total overpayment of \$465.71, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/13/2022 and overpayment was posted to IDROP on 2/18/2022. SURS was able to collect \$127.90 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Jones, Camille	11/04/2020	\$431.98	Member passed on 9/10/2020. SURS was notified of the death on 10/30/2020. A letter to the estate was sent on 12/16/2020 requesting the return of the October 2020 annuity payment for a total overpayment of \$1,431.98, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/30/2021. Overpayment was posted to IDROP on 6/16/2021. No money has been recovered to date.
Jones, Willie	12/15/2020	\$1,892.41	Survivor passed on 11/28/2020. SURS was notified of the death on 12/10/2020. A letter to the estate was sent on 7/29/2021 requesting the return of the December 2020 annuity payment for a total overpayment of \$2,224.03, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/13/2022 and overpayment was posted to IDROP on 2/18/2022. SURS received partial return \$331.62 from the bank. No additional money has been recovered to date.
King, Mary	3/29/2021	\$495.10	Member passed on 2/20/2021. SURS was notified of the death on 3/23/2021. A letter to the estate was sent on 5/18/2021 requesting the return of the March 2021 annuity payment for a total overpayment of \$1,495.10, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/13/2022. Overpayment was posted to IDROP on 2/18/2022. No money has been recovered to date.
Kinkle, Charas	2/24/2021	\$4,226.07	Member passed on 1/31/2021. SURS was notified of the death on 2/18/2021. A letter to the estate was sent on 5/04/2021 requesting the return of the February 2021 annuity payment for a total overpayment of \$5,234.57, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/13/2022. Overpayment was posted to IDROP on 2/18/2022. SURS was able to collect \$8.50 from IDROP. No additional money has been recovered to date.

Kurth, Rudolf	5/02/2019	\$7,868.42	Member passed on 10/15/2010. SURS was notified of the death on 4/30/2019. SURS suspended this member's annuity on 6/01/2011 due to failure to return his annual verification. A letter to the estate was sent on 7/30/2019 requesting the return of the November 2010 – May 2011 annuity payments for a total overpayment of \$8,868.42, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/20/2022. Member has a foreign address, so we cannot post this overpayment to IDROP. No money has been recovered to date.
Lane, Marla	7/20/2020	\$1,662.74	Member passed on 6/13/2020. SURS was notified of the death on 6/15/2020. A letter to the estate was sent on 10/08/2020 requesting the return of the July 2020 annuity payment for a total overpayment of \$2,662.74, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/30/2021. Overpayment was posted to IDROP on 6/16/2021. No money has been recovered to date.
Lee, Lena	6/17/2021	\$2,109.70	Member passed on 5/27/2021. SURS was notified of the death on 6/16/2021. A letter to the estate was sent on 8/24/2021 requesting the return of the June 2021 annuity payment for a total overpayment of \$3,109.70, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/20/2022. Overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.
Lerman, June	3/30/2020	\$638.88	Survivor passed on 2/20/2020. SURS was notified of the death on 3/26/2020. A letter to the estate was sent on 9/23/2020 (letter has incorrect date of 2/14/2019) requesting the return of the March 2020 annuity payment for a total overpayment of \$638.88, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 4/30/2021 and overpayment was posted to IDROP on 6/16/2021. No money has been recovered to date.
Linden, Myra	9/17/2020	\$2,458.42	Member passed on 8/31/2020. SURS was notified of the death on 9/13/2020. A letter to the estate was sent on 11/10/2020 requesting the return of the September 2020 annuity payment for a total overpayment of \$3,483.42, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/23/2021. Overpayment was posted to IDROP on 6/03/2021. SURS was able to collect \$25 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Logan, Reuben	3/15/2021	\$2,222.43	Survivor passed on 2/24/2021. SURS was notified of the death on 3/08/2021. A letter to the estate was sent on 8/04/20201 requesting the return of the March 2021 annuity payment for a total overpayment of \$2,222.43 but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/20/2022 and overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.

McMillan, Fred	8/04/2020	\$1,538.75	Member passed on 7/29/2020. SURS was notified of the death on 8/03/2020. A letter to the estate was sent on 8/07/2020 requesting the return of the August 2020 annuity payment for a total overpayment of \$2,538.75, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 2/01/2021. Overpayment was posted to IDROP on 12/20/2021. No money has been recovered to date.
Moody, Delores	1/27/2021	\$387.16	Member passed on 11/21/2020. SURS was notified of the death on 1/20/2021. A letter to the estate was sent on 3/02/2021 requesting the return of the December 2020 & January 2021 annuity payments for a total overpayment of \$1,427.16, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 4/20/2022. Overpayment was posted to IDROP on 6/23/2022. SURS was able to collect \$40.00 partial return from bank. No additional money has been recovered to date.
Moore, James	12/13/2018	\$16,213.28	Member passed on 10/06/2018. SURS was notified of the death on 12/12/2018. A letter to the estate was sent on 1/22/2019 requesting the return of the November and December 2018 annuity payments for a total overpayment of \$17,736.84, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 02/01/2021. Overpayment was posted to IDROP on 12/22/2021. SURS was able to collect \$523.56 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Moore, Kenneth	8/13/2020	\$721.19	Survivor passed on 7/17/2020. SURS was notified of the death on 8/07/2020. A letter to the estate was sent on 7/29/2021 requesting the return of the August 2020 annuity payment for a total overpayment of \$721.19, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/20/2022 and overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.
Nedved, Thomas	1/29/2020	\$531.34	Survivor passed on 12/31/2019. SURS was notified of the death on 1/22/2020. A letter to the estate was sent on 5/18/2020 requesting the return of the January 2020 annuity payment for a total overpayment of \$531.34, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 02/01/2021 and overpayment was posted to IDROP on 12/22/2021. No money has been recovered to date.
Owens, Nancy	2/24/2021	\$3,248.24	Survivor passed on 1/06/2021. SURS was notified of the death on 2/18/2021. A letter to the estate was sent on 8/04/2021 requesting the return of the February 2021 annuity payment for a total overpayment of \$3,248.24, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/20/2022 and overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.
Panalle, Patricia	4/28/2021	\$829.11	Member passed on 3/16/2021. SURS was notified of the death on 4/27/2021. A letter to the estate was sent on 7/07/2021 requesting the return of the April 2021 annuity payment for a total overpayment of

			\$1,829.11, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/20/2022. Overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.
Pappas, Pat	2/24/2021	\$541.90	Survivor passed on 1/21/2021. SURS was notified of the death on 2/18/2021. A letter to the estate was sent on 8/04/2021 requesting the return of the February 2021 annuity payment for a total overpayment of \$541.90, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/20/2022 and overpayment was posted to IDROP on 3/24/2022. No money has been recovered to date.
Parker, Aaron	10/22/2020	\$533.96	Member passed on 9/25/2020. SURS was notified of the death on 9/29/2020. A letter to the estate was sent on 10/26/2020 requesting the return of the October 2020 annuity payment for a total overpayment of \$1,579.96, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 02/01/2021. Overpayment was posted to IDROP on 12/22/2021. SURS was able to collect \$46.00 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Pierce, Yvonne	1/14/2020	\$5,068.80	Member passed on 12/24/2019. SURS was notified of the death on 1/10/2020. A letter to the estate was sent on 02/21/2020 requesting the return of the January 2020 annuity payment for a total overpayment of \$6,081.28, but no response or remittance has been received. A second attempt letter was sent on 5/19/2020 to a different address. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 2/05/2021. Overpayment was posted to IDROP on 4/29/2021. SURS was able to collect \$12.48 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Price, Josephine	7/09/2021	\$1,709.96	Member passed on 6/20/2021. SURS was notified of the death on 7/06/2021. A letter to the estate was sent on 7/16/2021 requesting the return of the July 2021 annuity payment for a total overpayment of \$2,709.96, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/24/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Pritchard, Charlotte	7/20/2020	\$1,710.86	Survivor passed on 6/08/2020. SURS was notified of the death on 7/14/2020. A letter to the estate was sent on 7/08/2021 requesting the return of the July 2020 annuity payment for a total overpayment of \$1,710.86, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/24/2022 and overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Randolph, Lois	1/19/2021	\$1,211.76	Survivor passed on 12/17/2020. SURS was notified of the death on 1/15/2021. A letter to the estate was sent on 7/30/2021 requesting the return of the January 2021 annuity payment for a total overpayment of \$1,211.76, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/24/2022

			and overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Rivera, Linda	5/11/2021	\$1,956.13	Member passed on 4/03/2021. SURS was notified of the death on 5/04/2021. A letter to the estate was sent on 5/26/2021 requesting the return of the May 2021 annuity payment for a total overpayment of \$2,956.13, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/24/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Shelton, Emma	10/22/2020	\$1,400.24	Member passed on 9/09/2020. SURS was notified of the death on 10/14/2020. A letter to the estate was sent on 11/10/2020 requesting the return of the October 2020 annuity payment for a total overpayment of \$2,400.24, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 5/24/2021. Overpayment was posted to IDROP on 7/23/2021. No money has been recovered to date.
Smith, Kenneth	5/06/2021	\$2,470.66	Survivor passed on 3/31/2021. SURS was notified of the death on 5/04/2021. A letter to the estate was sent on 8/04/2021 requesting the return of the April and May 2021 annuity payments for a total overpayment of \$2,470.66, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/24/2022 and overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Smith, Willie	5/20/2021	\$1,607.83	Survivor passed on 4/16/2021. SURS was notified of the death on 5/19/2021. A letter to the estate was sent on 8/04/2021 requesting the return of the May 2021 annuity payment for a total overpayment of \$1,607.83, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/25/2022 and overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Stevens, V Lee	11/18/2020	\$2,160.16	Member passed on 10/30/2020. SURS was notified of the death on 11/12/2020. A letter to the estate was sent on 2/04/2021 requesting the return of the November 2020 annuity payment for a total overpayment of \$3,160.16, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/25/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Vogeler, Dale	10/22/2020	\$204.41	Survivor passed on 9/27/2020. SURS was notified of the death on 10/13/2020. A letter to the estate was sent on 6/18/2021 requesting the return of the October 2020 annuity payment for a total overpayment of \$204.41, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/25/2022 and overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Wallace, Mary	1/14/2020	\$1,401.69	Member passed on 12/30/2019. SURS was notified of the death on 1/10/2020. A letter to the estate was sent on 12/09/2020 requesting the return of the January 2019 annuity payment for a total overpayment of

			\$3,016.70, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 5/24/2021. Overpayment was posted to IDROP on 7/23/2021. SURS was able to collect \$615.01 of unclaimed property from the States Treasurer's Office. No additional money has been recovered to date.
Washburn, Judith	4/06/2021	\$339.32	Member passed on 3/22/2021. SURS was notified of the death on 3/30/2021. A letter to the estate was sent on 4/30/2021 requesting the return of the April 2021 annuity payment for a total overpayment of \$1,339.32, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/25/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Waterman, Ruth	11/10/2020	\$1,059.45	Member passed on 10/20/2020. SURS was notified of the death on 11/06/2020. A letter to the estate was sent on 11/17/2020 requesting the return of the November 2020 annuity payment for a total overpayment of \$2,059.45, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/25/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Weissman, Marjorie	6/27/2018	\$6,550.65	Survivor passed on 2/10/2018. SURS was notified of the death on 6/25/2018. A letter to the estate was sent on 10/03/2018 requesting the return of the March, April and May 2018 annuity payments for a total overpayment of \$6,550.65, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 8/11/2022. Overpayment was not posted to IDROP because the member had a foreign address. No money has been recovered to date.
White, Daniel	2/26/2021	\$2,168.92	Member passed on 1/26/2021. SURS was notified of the death on 2/24/2021. A letter to the estate was sent on 5/13/2021 requesting the return of the February 2021 annuity payment for a total overpayment of \$3,168.92, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/25/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Williams, Frederick	7/09/2021	\$717.70	Member passed on 6/17/2021. SURS was notified of the death on 7/07/2021. A letter to the estate was sent on 7/16/2021 requesting the return of the July 2021 annuity payment for a total overpayment of \$1,717.70, but no response or remittance has been received. The bank was unable to return the funds. SURS did apply the \$1,000.00 death benefit to the entire overpayment balance. Final attempt letter was sent on 1/25/2022. Overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Wilson, Barbara	12/15/2020	\$508.13	Survivor passed on 11/26/2020. SURS was notified of the death on 12/10/2020. A letter to the estate was sent on 06/18/2021 requesting the return of the December 2020 annuity payment for a total overpayment of \$508.13, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/25/2022 and

			overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.
Wright, Faye	3/29/2021	\$3,210.45	Survivor passed on 1/18/2021. SURS was notified of the death on 3/23/2021. A letter to the estate was sent on 6/18/2021 requesting the return of the February 2021 annuity payment for a total overpayment of \$3,210.45, but no response or remittance has been received. The bank was unable to return the funds. Final Attempt letter was sent on 1/25/2022 and overpayment was posted to IDROP on 3/31/2022. No money has been recovered to date.



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October 6, 2020

Estate of Rebecca O Alfred
 c/o Carla Seaberry
 [REDACTED]

RE: Rebecca Alfred, deceased
 Member ID#: [REDACTED]

Dear Estate of Rebecca O Alfred:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Rebecca O Alfred that Rebecca Alfred has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Rebecca Alfred passed away on 08/25/2020; therefore, her survivor annuity was payable through August 2020.

At the time we were informed of her death, we had already sent her September 2020 survivor annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. September 2020	Sent On: 09/01/2020	Amount Sent: \$2,393.21
		Total Amount Sent: \$2,393.21

We have contacted JPMorgan Chase Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Rebecca O Alfred return the balance of \$2,393.21 to our office in the envelope provided.

If you are not the executor of the Estate of Rebecca O Alfred, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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April 16, 2021

The Estate of Rebecca Alfred
 C/o Carla Seaberry
 [REDACTED]

Member ID#: [REDACTED]

The Estate of Rebecca Alfred:

On October 6, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$2,393.21. The current amount due this system is \$2,393.21. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,393.21 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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April 23, 2021

The Estate of Rebecca Alfred
 C/o Jason Alfred
 [REDACTED]

Member ID# [REDACTED]

The Estate of Rebecca Alfred:

On October 6, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$2,393.21. The current amount due this system is \$2,393.21. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,393.21 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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June 2, 2020

Estate of Donna D Applegate

RE: Donna Applegate
 Member ID#: [REDACTED]

Dear Estate of Donna D Applegate:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Donna Applegate that Donna Applegate has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member dies. We were informed that Donna Applegate died on March 18, 2020; therefore, her retirement annuity was payable through March 2020.

At the time we were informed of her death, we had already sent her April 2020 retirement annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. April 2020 Sent On: 04/01/2020 Amount Sent: \$1,483.66

Total Amount Sent: \$1,483.66

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Donna Applegate return the balance of \$1,483.66 to our office in the envelope provided.

If you are not the executor of the Estate of Donna Applegate, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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April 16, 2021

The Estate of Donna Applegate

Member ID#: [REDACTED]

The Estate of Donna Applegate:

On June 2, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,483.66. Including the payments made, the current amount due this system is \$483.66. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$483.66 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g. attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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February 13, 2020

Estate of Marie C Aurel
 [REDACTED]

RE: Marie Aurel, deceased
 Member ID# [REDACTED]

Dear Estate of Marie C Aurel:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Marie Aurel that Marie Aurel has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Marie Aurel passed away on January 27, 2020; therefore, her retirement annuity was payable through January 2020.

At the time we were informed of her death, we had already sent her February 2020 retirement annuity payment to her checking account with Citibank through electronic transfer. The total amount of the deposit was:

1. February 2020 Sent On: 02/01/2020 Amount Sent: \$4,186.47

Total Amount Sent: \$4,186.47

We have contacted Citibank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Marie Aurel return the balance of \$4,186.47 to our office in the envelope provided.

If you are not the executor of the Estate of Marie Aurel, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 16, 2021

The Estate of Marie Aurel

Member ID# [REDACTED]

The Estate of Marie Aurel:

On February 13, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$4,186.47. Including payments that have been made, the current amount due this system is \$3,186.47. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$3,186.47 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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February 12, 2019

The Estate of Maria Barba

RE: Maria Barba, deceased
 Member ID#: [REDACTED]

Dear Estate of Maria Barba:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Maria Barba that Maria Barba has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Maria Barba passed away on September 13, 2018; therefore, her retirement annuity was payable through September 2018.

At the time we were informed of her death, we had already sent her October 2018 through January 2019 retirement annuity payments to her savings account with PNC Bank through electronic transfer. The total amount of each deposit was:

1. October 2018	Sent On: 10/01/2018	Amount Sent: \$6,248.60
2. November 2018	Sent On: 11/01/2018	Amount Sent: \$6,248.60
3. December 2018	Sent On: 12/01/2018	Amount Sent: \$6,248.60
4. January 2019	Sent On: 01/01/2019	Amount Sent: \$6,430.50

Total Amount Sent: \$25,176.30

We have contacted PNC Bank for the return of these deposits but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Maria Barba return the balance of \$25,176.30 to our office in the envelope provided.

If you are not the executor of the Estate of Maria Barba, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

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(Page 2 of 2)

The Estate of Maria Barba
February 12, 2019
Page 2

Sincerely yours,

A handwritten signature in black ink, appearing to read "Sara Gutknecht". The signature is fluid and cursive, with the first name "Sara" being more prominent.

Sara Gutknecht
Member Service Representative



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April 16, 2021

The Estate of Maria L Barba

Member ID#: [REDACTED]

The Estate of Maria Barba:

On February 12, 2019, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$25,176.30. Including the payments that have been made, the current amount due this system is \$24,176.30. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$24,176.30 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 21, 2019

The Estate of Julia Bardis
 C/o Amelia Bardis
 [Redacted]

RE: Julia Bardis, deceased
 Member ID#: [Redacted]

Dear Estate of Julia Bardis:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Julia Bardis that Julia Bardis has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Julia Bardis passed away on April 26, 2019; therefore, her retirement annuity was payable through April 2019.

At the time we were informed of her death, we had already sent her May 2019 retirement annuity payment to her checking account with Wells Fargo Bank through electronic transfer. The total amount of the deposit was:

1. May 2019	Sent On: 05/01/2019	Amount Sent: \$6,263.80
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Total Amount Sent: \$6,263.80

We have contacted Wells Fargo Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Julia Bardis return the balance of \$6,263.80 to our office in the envelope provided.

If you are not the executor of the Estate of Julia Bardis, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.

(Page 2 of 2)

The Estate of Julia Bardis

May 21, 2019

Page 2

A handwritten signature in black ink, appearing to read "Sara Gutknecht", is written over a white rectangular background. This white background is positioned on top of a large, solid black rectangular redaction bar that spans the width of the page.

Sara Gutknecht

Member Service Representative



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April 16, 2021

The Estate of Julia Bardis

Member ID#: [REDACTED]

The Estate of Julia. Bardis:

On May 21, 2019, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$6,263.80. Including the payments that have been made, the current amount due this system is \$5,263.80. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$5,263.80 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 4, 2021

Estate of Michael Berger
 [REDACTED]

RE: Michael Berger, deceased
 Member ID#: [REDACTED]

Dear Estate of Michael Berger:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Michael Berger that Michael Berger has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Michael Berger passed away on January 21, 2021; therefore, his retirement annuity was payable through January 2021.

At the time we were informed of his death, we had already sent his February 2021 retirement annuity payment to his checking account with Rock Valley Federal Credit Union through electronic transfer. The total amount of the deposit was:

1. February 2021 Sent On: 02/01/2021 Amount Sent: \$2,702.70

Total Amount Sent: \$2,702.70

We have contacted Rock Valley Federal Credit Union for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Michael Berger return the balance of \$2,702.70 to our office in the envelope provided.

If you are not the executor of the Estate of Michael Berger, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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www.surs.org

January 6, 2022

Estate of Michael Berger

Member ID# [REDACTED]

To Whom It May Concern:

On July 7, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,702.70. Including all payments that have been made, the current amount due this system is \$1,702.70. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,702.70 to our office by **February 5, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 5, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 18, 2020

Estate of Donald Brannon
 c/o Carolyn Walker
 [REDACTED]

RE: Donald Brannon, deceased
 Member ID#: [REDACTED]

Dear Estate of Donald Brannon:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Donald Brannon that Donald Brannon has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Donald Brannon passed away on 03/27/2020; therefore, his survivor annuity was payable through March 2020.

At the time we were informed of his death, we had already sent his April 2020 survivor annuity payment to his checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. April 2020	Sent On: 04/01/2020	Amount Sent: \$1,106.63
---------------	---------------------	-------------------------

Total Amount Sent: \$1,106.63

We have contacted US Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Donald Brannon return the balance of \$1,106.63 to our office in the envelope provided.

If you are not the executor of the Estate of Donald Brannon, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

Member Service Division

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April 16, 2021

The Estate of Donald Brannon
C/o Carolyn Walker
[REDACTED]

Member ID# [REDACTED]

The Estate of Donald Brannon:

On May 18, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,106.63. The current amount due this system is \$1,106.63. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,106.63 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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July 29, 2021

Estate of Donna Burwell
 C/O Steven Burwell
 [REDACTED]

RE: Donna Burwell, deceased
 Member ID#: [REDACTED]

Dear Estate of Donna Burwell:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Donna Burwell that Donna Burwell has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Donna Burwell passed away on November 26, 2020; therefore, her survivor annuity was payable through November 2020.

At the time we were informed of her death, we had already sent her December 2020 survivor annuity payment to her checking account with University of Illinois Community Credit Union through electronic transfer. The total amount of the deposit was:

1. December 2020 Sent On: 12/01/2020 Amount Sent: \$1,575.47

Total Amount Sent: \$1,575.47

We have contacted University of Illinois Community Credit Union for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Donna Burwell return the balance of \$1,575.47 to our office in the envelope provided.

If you are not the executor of the Estate of Donna Burwell, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 6, 2022

Estate of Donna Burwell
C/o Steven J Burwell
[REDACTED]

Member ID#: [REDACTED]

To Whom It May Concern:

On July 29, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,575.47. The current amount due this system is \$1,575.47. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,575.47 to our office by **February 5, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 5, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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March 8, 2021

Estate of Dixianna Butz
 C/o Susan Swanson
 [REDACTED]

RE: Dixianna Butz, deceased
 Member ID# [REDACTED]

Dear Estate of Dixianna Butz:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Dixianna Butz that Dixianna Butz has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Dixianna Butz passed away on 11/29/2020; therefore, her retirement annuity was payable through November 2020.

At the time we were informed of her death, we had already sent her December 2020 retirement annuity payment to her checking account with Prospect Bank through electronic transfer. The total amount of the deposit was:

1. December 2020 Sent On: 12/01/2020 Amount Sent: \$2,028.09

Total Amount Sent: \$2,028.09

We have contacted Prospect Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Dixianna Butz return the balance of \$2,028.09 to our office in the envelope provided.

If you are not the executor of the Estate of Dixianna Butz, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions concerning this matter, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 6, 2022

Ms. Dixianna Butz
 C/o Susan Swanson

Member ID#: [REDACTED]

To Whom It May Concern:

On March 8, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,028.09. Including all payments that have been made, the current amount due this system is \$1,028.09. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,028.09 to our office by **February 5, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 5, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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December 1, 2020

Estate of Marcia L Canary
 c/o Michael O'Hara
 [REDACTED]

RE: Marcia L. Canary, deceased
 Member ID#: [REDACTED]

Dear Estate of Marcia L Canary:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Marcia L Canary that Marcia L Canary has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Marcia L Canary passed away on 10/18/2020; therefore, her retirement annuity was payable through October 2020.

At the time we were informed of her death, we had already sent her November 2020 retirement annuity payment to her checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. November 2020 Sent On: 11/01/2020 Amount Sent: \$5,031.70

Total Amount Sent: \$5,031.70

We have contacted US Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Marcia L Canary return the balance of \$5,031.70 to our office in the envelope provided.

If you are not the executor of the Estate of Marcia L Canary, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 16, 2021

The Estate of Marcia Canary
 C/o Michael O'Hara
 [REDACTED]

Member ID#: [REDACTED]

The Estate of Marcia Canary:

On December 1, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$5,031.70. Including the payments that have been made, the current amount due this system is \$4,031.70. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$4,031.70 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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State Universities Retirement System of Illinois

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1-800-ASK SURS

(217) 378-9800 (FAX)

(217) 378-8800 (C-U)

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August 14, 2012

Mr. Tyrone Cavitt

RE: Member ID [REDACTED]

Dear Mr. Cavitt:

The State Universities Retirement System (SURS) has been advised that you recently received a Workers' Compensation Award (case #06 WC 11546) due to the on-the-job accident you experienced. Pursuant to Section 5/15-153.1 of the Illinois Compiled Statutes Chapter 40, SURS is entitled to offset disability benefits when an employee receives benefits under the State Workers' Compensation or Diseases Act.

Based upon our review of your award, the amount of the offset has been determined as follows:

<u>Dates</u>	<u>Offset Amount</u>
03/15/2008 – 10/27/2008	\$1,374.44/mo
10/28/2008 – 08/27/2009	\$1,752.26/mo
08/28/2009 – 07/25/2012	\$1,271.65/mo
07/26/2012 – 07/22/2016	\$1,401.81/mo
07/23/2016 – 08/31/2016	\$1,752.26/mo

You were awarded Temporary Total Disability (TTD) benefits for 167.28 weeks, or 38.60 months, beginning 3/21/2006 and ending 10/27/2008 at a rate of \$317.18 per week, or \$1,374.44 per month. You were also awarded Permanent Total Disability (PTD) benefits for life beginning 10/28/2008 at a rate of \$404.37 per week, or \$1,752.26 per month. SURS does not offset for the portion of your award that is deducted for attorney's fees or costs. Your attorney has verified that his fee is \$350.45 per month which is applied to all PTD benefits from 8/28/09 thru 7/22/16 (82.83 months). Your attorney has also verified that the cost that he has incurred amounts to \$4,547.16 from 8/28/09-7/25/12 (34.93 months). Therefore, the offset amount is reduced to \$1,271.65 per month during the 34.93 months for which attorney's fees and costs were applicable. The offset amount is reduced to \$1,401.81 per month during the remaining 47.90 months for which attorney's fees were applicable.

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

(Page 2 of 2)

Mr. Tyrone Cavitt
August 14, 2012
Page 2

Your disability benefit from SURS began on 3/15/2008 and will continue until 8/31/2016 as long as you remain medically approved. However, due to the offset described above, your disability benefits have been overpaid by a total of \$51,740.39. Your disability will continue to be offset thru 8/31/2016. Therefore, beginning with your August 2012 disability benefit you will not be receiving a payment because the amount of your workers compensation offset exceeds the gross monthly amount of your benefit.

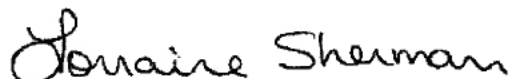
Please send your remittance of \$51,740.39 made payable to the State Universities Retirement System in order to adjust for the overpayment. If payment is not been received by September 14, 2012, interest on the balance due will be applied at the current effective rate.

STAFF DETERMINATION

You may file a written Request for Review by the Director of Member Services at SURS, at the address shown above, if you believe this determination is incorrect. Your Request for Review must be **received** by SURS within 30 days from the date of this Determination. If you fail to file a request within 30 days, this decision will become final because you elected not to seek administrative review of the decision

If you have any questions, please contact a SURS Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign/Urbana area.

Sincerely yours,



Lorraine A. Sherman
Member Service Representative

Tyrone Cavitt*QDP*Re: Member # 

State Universities Retirement System of Illinois
1901 Fox Drive
Champaign, IL 61820-7333

RECEIVED
SEP - 7 2012
STATE UNIV. RET. SYS.

-- -- This letter is to request in Writing a Review by the Director of Member Services
SURS to review
my case as it relates to over payments made to me as noted in your letter dated
August 14, 2012.

I believed I was receiving my Retirement benefits and not the SURS. That was my
request .

I have lots of questions regarding this letter. Why did this take three years to
discover that I was being overpaid.

I would like to be contacted regarding this matter, as well because I am in the
middle of a Chapter 13, that doesn't end until 2013.

Thank You
Tyrone Cavitt

CW
SEP 07 2012



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March 13, 2013

Mr. Tyrone Cavitt

Re: Member ID [REDACTED]

Dear Mr. Cavitt:

Please accept my apologies for the lengthy delay in response to your September 7, 2012 correspondence concerning the amount of the overpayment you have with the State Universities Retirement (SURS).

During my initial review, I noticed there was an error in the offset calculation and notified staff to recalculate the offset. Subsequently, your employer submitted information concerning your vacation payout, which caused another revision to the disability calculation. After your benefit was revised, I reviewed the offset calculation and overpayment amount to verify it was accurate.

The overpayment with this System is due to your receipt of a Workers' Compensation award. Pursuant to Section 15-153.1 of the Illinois Pension Code, SURS is entitled to offset disability benefits when an employee receives Workers' Compensation benefits during the same period SURS disability benefits are payable. Prior to the commencement of your disability benefits, you were notified of this potential offset and that if the SURS benefits were overpaid, you would be required to reimburse the system (see enclosure).

According to the award for Case #06 WC 11546, you received Temporary Total Disability (TTD) benefits of \$317.18 per week (\$1,374.44/month) for 167.28 weeks, beginning 3/21/06 and ending 10/27/08. You were also awarded Permanent Total Disability (PTD) benefits of \$404.37 per week (\$1,752.26/month) payable for life. You also received SURS disability benefits from 3/15/08 thru 8/31/12, at which time you retired.

During any month you received Workers' Compensation benefits, your SURS disability benefits are offset by that amount. In your case, the amount of the Workers' Compensation benefit exceeded the amount of your disability the entire time SURS benefits were paid. Please note the offset calculation did exclude attorney fees and costs as reported by your attorney.

In the initial overpayment letter, dated August 14, 2012, you were informed the amount of the overpayment was **\$51,740.39**. Unfortunately, this amount was incorrect as the offset calculation was not applied until 10/28/08 and should have been applied beginning 3/15/08. This was the error I mentioned earlier. The actual overpayment amount is **\$59,837.21**. This amount represents disability benefits paid to you from 3/15/08 thru 8/31/12.

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

(Page 2 of 2)

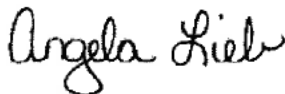
Mr. Tyrone Cavitt
March 13, 2013
Page 2

In your correspondence you inquired about the delay in notifying you of the overpayment. During my review, I noticed the Arbitration Decision was received in our office on September 22, 2009. Unfortunately, it was sent directly to your file and the appropriate staff member was not notified to do the offset calculation. It was only during a routine review of claims in July 2012, that the decision was discovered in your file. I sincerely apologize for this human error and can assure you steps have been implemented to avoid this in the future.

After review, it is the position of this System, your disability benefits have been overpaid in the amount of **\$59,837.21**. Please remit payment in full to our office at the address above, or contact me to make other payment arrangements. Please be advised interest charges will apply on the unpaid balance each month.

If you are adversely affected by this decision, you may petition for a hearing before the SURS Claims Panel. Your Petition for Review, addressed to the SURS General Counsel, must be **received** by SURS no later than 30 days from the date of this letter or this decision will be final and unappealable.

Sincerely yours,

A handwritten signature in cursive script that reads "Angela Lieb".

Angela Lieb
Director of Member Services

PETITION FOR REVIEW**RECEIVED RE**
APR 16 2013

STATE UNIV. RET. SYS.

TO: Karen Maggio

This letter constitutes my Petition for Review of my claim denial.

I specifically request a Hearing before the Claims Panel of the Board of Trustees of the State Universities Retirement System. The basis of my petition is:

As stated in prior letter why was I not notified off the offset calculation once it was discovered, as well why would you continue to disburse me additional checks. I don't think it was my responsibility to that a miscalculation of the offset, it was an error on your representatives part. It appears according to your letter that you made several errors in your calculation, and that I am being responsible

Telephone No. 618-398-7815

RE: Tyrone Cavitt

Member ID [REDACTED]

Claimant's Authorized Representative (if applicable)

Address (Street, City, State, Zip Code)

Tyrone Cavitt

Claimant's Signature

4-11-13

Date

For your representatives incompetence. I am a 71 yr old man with dementia. I will have to get an attorney for your mistakes that you have admitted to in this letter. I need to talk face to face with someone. This is a petition for a hearing because this has adversely affected my health. You lost. Because of you lose that you admit in my file.

(Page 1 of 10)
Tyrone Cavitt
File No. 2013-13
Page 5 of 6

Statement of Claim-attention Karen Maggio

Name: Tyrone Cavitt

Member ID [REDACTED]

Statement of the facts forming the basis of my appeal and an explanation of the relief that I am seeking
(use additional sheets of paper if needed):

See Attached Letter

I understand that I must attach to this statement all documents or other written or tangible materials that I wish the Claims Panel to consider. I understand that no additional documents or other materials can be submitted at the hearing.

Signed: *Tyrone Cavitt* Date: *6-4-13*

Name and address of my authorized representative, if any:

Self & Daughter
Dasheda Clayton

RECEIVED RE
JUN 24 2013
STATE UNIV. RET. SYS.

MD JUN 24 2013

Tyrone Cavitt

File No. 2013-13

Page 6 of 6

State Universities Retirement System of Illinois

Champaign, Illinois

APPEARANCE-FAX TO 217-378-9800 Attention Karen Maggio

I hereby give notice of my intention (check appropriate box(es)):

☒ to be present at the Claims Panel hearing. I will be present:☐ in person;☒ via telephone³.

My telephone number is [REDACTED]

☐ not to be present at the Claims Panel hearing.

Signed: _____



Claimant

³ If you choose to be present by telephone, SURS staff will call you when your hearing begins. You must fill in your telephone number if you choose to be present by telephone so that you may be called when your hearing begins. Your hearing will not begin earlier than the time stated on the Notice of Hearing; however, it may be later than the time stated if the Claims Panel is hearing other claims.

Tyrone Cavitt
File No 2012-13

June 5, 2013

Re: Statement of Claim
Attn: Karen Maggio
Member ID: [REDACTED]

Statement of the facts forming the basis of my appeal and an explanation of the relief that I am seeking.

Please refer to your letter addressed to me on March 13, 2012. This is regarding your overpayment letter dated August 14, 2012.

On September 7, 2012 I responded to your letter voicing my concerns regarding the amount of overpayment you state I owe. However you did not respond to me until March 13, 2013 some 7 months later, at which time you advised me that in "the initial overpayment letter, dated August 14, 2012 the overpayment was \$51,740.39 and that unfortunately that amount was incorrect, as the offset calculation was not applied until 10-28-08 and should have been applied 3-15-08. In your own words you state:

"YOU NOTICED THE ARBITRATION DECISION WAS RECEIVED IN YOUR OFFICE ON SEPTEMBER 22, 2009 AND THAT UNFORTUNATELY IT WAS SENT DIRECTLY TO MY FILE AND NOT TO ME". YOU STATE THAT THE APPROPRIATE STAFF MEMBER WAS NOT NOTIFIED TO DO THE OFFSET CALCULATION". AS WELL YOU NOTE THAT IT WAS ONLY DURING A ROUTINE REVIEW OF CLAIMS IN JULY 2012, THAT THE DECISION WAS DISCOVERED IN MY FILE."

You offered a sincere apology for this "HUMAN ERROR" caused by your office and assured that steps have been implemented to avoid this in the future.

However due to this huge oversight and error made by your office and your employees this has adversely affected me and my family. As an employee I depend on you and your office's professionalism and accuracy when it comes to the calculations of benefits and timely notification to responses made to your office.

I feel that your office should be held solely responsible for the errors they have made and the hardship it has caused me and my family regarding my claim.

I also feel that this should be dismissed by the committee and the SURS General Counsel. And your office should be held accountable for the hardship and pain it has caused my family.

I pray the committee does not penalize me and my family for errors that were obviously and admitted by you and your staff. For I am living on a limited income of disability and would be dead before I could pay the amount that you have deemed I owe based on your mistakes.

Thanks in advance

Tyrone Cavitt

RECEIVED RE

JUN 24 2013

STATE UNIV. RET. SYS.

(Page 4 of 10)

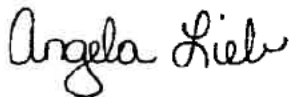
Mr. Tyrone Cavitt
March 13, 2013
Page 2

In your correspondence you inquired about the delay in notifying you of the overpayment. During my review, I noticed the Arbitration Decision was received in our office on September 22, 2009. Unfortunately, it was sent directly to your file and the appropriate staff member was not notified to do the offset calculation. It was only during a routine review of claims in July 2012, that the decision was discovered in your file. I sincerely apologize for this human error and can assure you steps have been implemented to avoid this in the future.

After review, it is the position of this System, your disability benefits have been overpaid in the amount of **\$59,837.21**. Please remit payment in full to our office at the address above, or contact me to make other payment arrangements. Please be advised interest charges will apply on the unpaid balance each month.

If you are adversely affected by this decision, you may petition for a hearing before the SURS Claims Panel. Your Petition for Review, addressed to the SURS General Counsel, must be **received** by SURS no later than 30 days from the date of this letter or this decision will be final and unappealable.

Sincerely yours,



Angela Lieb
Director of Member Services

RECEIVED RE

JUN 24 2013

STATE UNIV. RET. SYS.



State Universities Retirement System of Illinois

Serving Illinois Community Colleges and Universities

1901 Fox Drive • Champaign, IL 61820-7333

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(217) 378-9800 (FAX)

(217) 378-8800 (C-U)

www.surs.org

March 13, 2013

Mr. Tyrone Cavitt

Re: Member ID [REDACTED]

RECEIVED RE**JUN 24 2013****STATE UNIV. RET. SYS.**

Dear Mr. Cavitt:

Please accept my apologies for the lengthy delay in response to your September 7, 2012 correspondence concerning the amount of the overpayment you have with the State Universities Retirement (SURS).

✓ During my initial review, I noticed there was an error in the offset calculation and notified staff to recalculate the offset. Subsequently, your employer submitted information concerning your vacation payout, which caused another revision to the disability calculation. After your benefit was revised, I reviewed the offset calculation and overpayment amount to verify it was accurate.

✓ The overpayment with this System is due to your receipt of a Workers' Compensation award. Pursuant to Section 15-153.1 of the Illinois Pension Code, SURS is entitled to offset disability benefits when an employee receives Workers' Compensation benefits during the same period SURS disability benefits are payable. Prior to the commencement of your disability benefits, you were notified of this potential offset and that if the SURS benefits were overpaid, you would be required to reimburse the system (see enclosure).

✓ According to the award for Case #06 WC 11546, you received Temporary Total Disability (TTD) benefits of \$317.18 per week (\$1,374.44/month) for 167.28 weeks, beginning 3/21/06 and ending 10/27/08. You were also awarded Permanent Total Disability (PTD) benefits of \$404.37 per week (\$1,752.26/month) payable for life. You also received SURS disability benefits from 3/15/08 thru 8/31/12, at which time you retired.

✓ During any month you received Workers' Compensation benefits, your SURS disability benefits are offset by that amount. In your case, the amount of the Workers' Compensation benefit exceeded the amount of your disability the entire time SURS benefits were paid. Please note the offset calculation did exclude attorney fees and costs as reported by your attorney.

✓ In the initial overpayment letter, dated August 14, 2012, you were informed the amount of the overpayment was **\$51,740.39**. Unfortunately, this amount was incorrect as the offset calculation was not applied until 10/28/08 and should have been applied beginning 3/15/08. This was the error I mentioned earlier. The actual overpayment amount is **\$59,837.21**. This amount represents disability benefits paid to you from 3/15/08 thru 8/31/12.

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

*Sent letter for petition before the
SURS Panel*

State Universities Retirement System of Illinois
Champaign, Illinois

NOTICE OF HEARING

File No. 2013-13

RECEIVED RE

JUN 24 2013

To: Tyrone Cavitt

Time and Date of Hearing:

Time to be announced

Date: August 27, 2013

STATE UNIV. RET. SYS.

Place of Hearing:

State Universities Retirement System
Main Conference Room
1901 Fox Drive
Champaign, Illinois

Nature of Hearing

Worker's Compensation Offset

Legal authority and jurisdiction under which hearing is to be held: 40 ILCS 5/15-163, 15-168, 15-168.1, 15-177, and 80 IL Admin. Code 1600.

Particular sections of the substantive and procedural statutes and rules involved: 40 ILCS 5/15-153.1, 80 IL Admin. Code 1600.500.

The Director of Member Services of SURS has denied your claim. IF YOU FAIL TO RESPOND TO THE REQUIREMENTS SET FORTH IN THIS NOTICE YOU MAY LOSE YOUR RIGHT TO HAVE THE CLAIMS PANEL REVIEW THE DECISION OF THE DIRECTOR OF MEMBER SERVICES. YOU ALSO MAY LOSE YOUR RIGHT TO SEEK REVIEW OF THE ACTION OF SURS IN COURT.

WHAT YOU MUST DO:

1. You must file a Statement of Claim (form enclosed) with the General Counsel so that it is received by the General Counsel no later than 30 days prior to the date of hearing.

The Statement of Claim must include the following: your name; your member I.D. number; your address; the name and address of anyone you have authorized to represent you at the hearing, if any; a statement of the facts forming the basis for your appeal; copies of any documents or other materials you wish the Claims Panel to consider; and an explanation of the relief that you are seeking.

ALL DOCUMENTS OR OTHER WRITTEN MATERIALS YOU WISH THE CLAIMS PANEL TO CONSIDER MUST BE SUBMITTED WITH YOUR STATEMENT OF CLAIM. NO ADDITIONAL DOCUMENTS OR WRITTEN MATERIALS CAN BE SUBMITTED AT THE HEARING.¹

2. You must provide written confirmation of your intent to appear or not to appear at the hearing (whether you desire to appear in person or by telephone) to the General Counsel so that it is

¹ A copy of the SURS administrative hearing rule, 80 IL Admin. Code 1600.500, is enclosed. Please refer to these rules regarding the requirement to obtain approval of the Hearing Officer to conduct discovery or to take a deposition prior to the hearing. If you seek to conduct discovery or to take a deposition, you must follow the steps set forth in §1600.500.

(Page 7 of 10)
Tyrone Cavitt
File No. 2013-13
Page 4 of 6

received by the General Counsel at least 3 days prior to the date of hearing. FAILURE TO DO SO IS A WAIVER OF THE RIGHT TO BE PRESENT BEFORE THE CLAIMS PANEL. The address and fax number of the General Counsel are set forth in footnote 2 at the bottom of this page.² A form is enclosed for you to fill out and return within the specified time (you may return this form with your Statement of Claim).

PROOF OF SERVICE

The undersigned certifies that a copy of this Notice of Hearing was served upon the claimant by mailing via U.S. regular mail, and certified mail, return receipt requested, with postage fully prepaid, at Champaign, Illinois, on April 17, 2013.

Karen Maggio

² Your written confirmation must be provided to: General Counsel, (Attention Karen Maggio) State Universities Retirement System, 1901 Fox Drive, P.O. Box 2710, Champaign, IL 61825-2710; (217)378-9800 fax.



State Universities Retirement System of Illinois

Serving Illinois Community Colleges and Universities

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217) 378-9800 (FAX)

(217) 378-8800 (C-U)

www.surs.org

Mr. Tyrone Cavitt

RECEIVED

April 17, 2013

RE

JUN 24 2013

STATE UNIV. RET. SYS.

RE: Member ID # [REDACTED]

Dear Mr. Cavitt:

The State Universities Retirement System (SURS) has scheduled your appeal for August 27, 2013. Please find enclosed the Notice of Hearing.

IMPORTANT INFORMATION AND DATES – KEEP THIS LETTER

1. You must file a Statement of Claim with SURS by July 29, 2013. The Statement of Claim is your opportunity to state the nature of your claim, present written arguments, and produce any documentary evidence supporting your appeal. Failure to file a Statement of Claim by the deadline will result in a dismissal of your claim. The Statement of Claim form is attached to this Notice. The Statement of Claim can be faxed to 217-378-9800.
2. You will receive an Agenda packet containing relevant documents on file with SURS and your submissions approximately 1 week prior to the hearing date.
3. You must file the Appearance with SURS by August 22, 2013. Failure to do so is a waiver of the right to be present before the Claims Panel. The Appearance form is attached to this Notice. The Appearance can be faxed to 217-378-9800.
4. If you fail to respond to the requirements set forth in the Notice of Hearing mailed to you, you may lose your right to have the Claims Panel review the decision of the Director of Member Services. You also may lose your right to seek review of the action of SURS in court.
5. If you wish to withdraw the appeal, please notify this office in writing at any time.

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

Please contact this office if you have any questions.

Sincerely yours,

Karen Maggio

Karen Maggio
Administration

COPY

State Universities Retirement System of Illinois
Serving Illinois Community Colleges and Universities

1901 Fox Drive • Champaign, IL 61820-7333
1-800-ASK SURS
(217) 378-9800 (FAX)
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www.surs.org

RECEIVED RE

JUN 24 2013

STATE UNIV. RET. SYS.

March 2, 2009

Mr. Tyrone Cavitt

RECEIVED LS

MAR 30 2009

STATE UNIV. RET. SYS.

RE: Member ID [REDACTED]

Dear Mr. Cavitt:

The State Universities Retirement System (SURS) has been advised that you have a pending Workers' Compensation award which has not yet been finalized.

Pursuant to Section 5/15-153.1 of the Illinois Compiled Statutes Chapter 40, SURS is entitled to offset disability benefits when an employee receives benefits under the State Workers' Compensation or Diseases Act. As a result, by the time your Worker's Compensation award is finalized, you could be overpaid by SURS for disability benefits that should have been offset by the Worker's Compensation award. If an overpayment occurs, you will be asked to return the overpayment to SURS. Please read the agreement below, sign and date, and return this letter back to our office.

I, Tyrone Cavitt, agree to return any overpayment made by SURS if I receive benefits under the State Workers' Compensation or Diseases Act that cause an offset to my SURS disability benefit.

Tyrone Cavitt
Signature

3-27-09
Date

If you have any questions, please contact a SURS Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign/Urbana area.

Sincerely yours,

Jaime Broom

Jaime C. Broom
Member Service Representative

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with State and Federal law. No employee of SURS has the authority to bind the system to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

MD MAR 30 2009

MH

AUG 13 2013

**STATE UNIVERSITIES RETIREMENT SYSTEM
OF CHAMPAIGN, ILLINOIS**

RECEIVED RE
AUG 13 2013

STATE UNIV. RET. SYS.

IN THE MATTER OF:)

TYRONE CAVITT,)

Claimant.)

Member ID: _____

CCMC QDD

**STATE UNIVERSITIES RETIREMENT SYSTEM OF ILLINOIS' RESPONSE TO
STATEMENT OF CLAIMS OF TYRONE CAVITT**

NOW COMES, SURS staff, by and through its attorneys, Thomas, Mamer & Haughey, LLP and for its Response to Claimant Tyrone Cavitt's Statement of Claims, states as follows:

Claimant, Tyrone Cavitt, was paid SURS disability benefits for the relevant time of 3/15/08 through 8/31/12.

Claimant was also awarded benefits under the Illinois Workers' Compensation Act in Case No. 06-WC-11546. He received temporary total disability benefits (TTD) for \$317.18 per week for 127.28 weeks for the time period of 3/21/06 through 10/28/08. He was also awarded permanent total disability benefits at \$404.37 per week (\$1,752.26 per month), beginning on 10/29/08 payable for life.

Claimant was notified of the overpayment of \$51,740.39 on 8/14/12. A correction letter was sent on 3/13/13 advising that the true amount was \$59,837.21 for the period of 3/15/08 through 8/31/12. Petitioner received SURS benefits for the same time period.

Claimant is asking that the entire amount of overpayment be forgiven because 1) there was approximately a six (6) month delay by SURS responding to his 9/7/12 letter

Scanned MH

about the overpayment and 2) there was a delay by SURS in seeking the credit from the arbitrator's decision, received at SURS on 9/22/09, and discovered in July of 2012.

No error in calculations is being asserted by the claimant. Claimant is simply asking that the amount be forgiven because of a delay and personal hardship.

The relevant statute in question is 40 ILCS 5/15-153.1(c) which states:

"a deduction shall be made equivalent to any benefits payable to any employee under any State or Federal Worker's Compensation or Occupational Diseases Acts for any period for which disability benefits are payable."

There is no statutory provision for hardship or delays in calculating the offset. The Claims Committee is without statutory authority to change the decision of SURS staff based on the reasons contended by the claimant. As such, Angie Lieb's review of decision of 3/13/13 regarding the offset and the amounts must be affirmed.

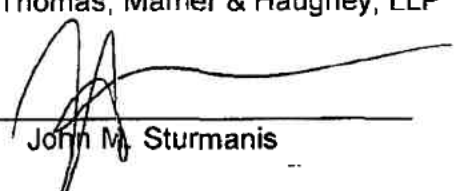
Dated: August 12, 2013

Respectfully submitted,

STATE UNIVERSITIES RETIREMENT
SYSTEM of Illinois

By: Thomas, Mamer & Haughey, LLP

By:


John M. Sturmanis

Prepared by:
John M. Sturmanis
Thomas, Mamer & Haughey, LLP
P.O. Box 560
Champaign, IL 61824-0560
Telephone: 217-351-1500
Facsimile: 217-351-2017

RECEIVED RE

AUG 13 2013

STATE UNIV. RET. SYS.

CERTIFICATE OF SERVICE

Under penalties as provided by law pursuant to Section 1-109 of the Code of Civil Procedure, the undersigned hereby certifies that he faxed and mailed a true and correct copy of the foregoing **State Universities Retirement System of Illinois' Response to Statement of Exceptions of Tyrone Cavitt** to the following persons by placing same in the U.S. Mail, postage fully prepaid this 12th day of August, 2013.

SURS, Executive Committee
c/o Karen Maggio
1901 Fox Drive
Champaign, IL 61820

Mr. Michael Weinstein
State Universities Retirement System of Illinois
1901 Fox Drive
Champaign, IL 61820

Ms. Angie Lieb
Deputy Director
State Universities Retirement System
1901 Fox Drive
Champaign, IL 61825-2710

Mr. Tyrone Cavitt




Prepared by:
John M. Sturmanis
Thomas, Mamer & Haughey, LLP
P.O. Box 560
Champaign, IL 61824-0560
Telephone: 217-351-1500
Facsimile: 217-351-2017

RECEIVED RE

AUG 13 2013

STATE UNIV. RET. SYS.



State Universities Retirement System of Illinois

Serving Illinois Community Colleges and Universities

1901 Fox Drive • Champaign, IL 61820-7333
(217) 378-8800 • (217) 378-9801 (FAX)

Legal Department

May 22, 2014

Mr. Tyrone Cavitt



RE: Member ID



Dear Mr. Cavitt:

The Claims Panel of the State Universities Retirement System (SURS) has issued the written decision for the disposition of your claim. A copy is enclosed. A copy of the SURS rule concerning the nature and requirements of formal hearings is also enclosed.

If you choose, you may submit a written Statement of Exceptions setting forth any points where you disagree with the Claims Panel Decision. A Statement of Exceptions and a brief in support, if any, must be received no later than June 12, 2014. Instead of mailing, you may fax a Statement of Exceptions to 217-378-9800 by June 12, 2014. Staff may also file a Statement of Exceptions. If a Statement of Exceptions is filed, the other party may file a Response no later than 21 days after the filing of the Statement of Exceptions. If a Response is filed, a Reply may be filed no later than 14 days after the filing of the Response. All filings must be served upon the opposing party and shall contain a certificate of service.

If you choose to submit a Statement of Exceptions by mail, it should be sent to:

SURS, Executive Committee
c/o Karen Goodmann
1901 Fox Drive
Champaign, IL 61820

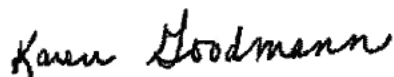
If a Statement of Exceptions is filed, then the claim will be presented to the Executive Committee of the SURS Board of Trustees for a final administrative decision (you will receive written notice of the Executive Committee decision). **If a Statement of Exceptions is not filed in a timely manner, the Decision of the Claims Panel will be deemed final and cannot be appealed.**

(Page 2 of 14)

Mr. Tyrone Cavitt
May 22, 2014
Page 2

If you have named an authorized representative to assist you in connection with this claim, a copy of this letter, a copy of the Claims Panel Decision, and a copy of the SURS Hearing rule are being sent to your authorized representative as well.

Sincerely yours,



Karen L. Goodman
Legal Department

CC: Mr. Michael Weinstein

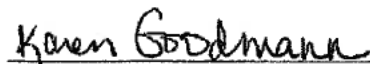
CERTIFICATE OF SERVICE

I, Karen Goodman, certify that on May 22, 2014, I served a copy of this letter on the above-named individual by:

_____ Certified mail, return receipt requested, depositing the same in the United States mail at 1901 Fox Drive, Champaign, IL, 61820, with first-class postage fully prepaid, and addressed as set forth above.

_____ Registered mail, return receipt requested, depositing the same in the United States mail at 1901 Fox Drive, Champaign, IL, 61820, with first-class postage fully prepaid, and addressed as set forth above.

X Third-party commercial carrier United Parcel Service, ground mailing service, routing number 12 645 814 03 5119 1914, depositing the same in the United Parcel Service drop at 1901 Fox Drive, Champaign, IL, 61820, with shipping fee fully prepaid and addressed as set forth above.



Karen Goodman

HOLLY SILVER
(217) 378-8800
STATE UNIV RETIREMENT SYSTEM
1901 FOX DRIVE
CHAMPAIGN IL 61820

LBS

1 OF 1

SHIP TO:
TYRONE CAVITT
TYRONE CAVITT



IL 622 0-01



UPS GROUND

TRACKING #: 12 645 814 03 5119 1914



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LP2442 51, EA 36/2814



SEE NOTICE ON REVERSE regarding UPS's limited liability for loss of or damage to contents of boxes. UPS is not an insuring agent for express parcels and is not a carrier. If shipped from the U.S., ships will have the same status, including the same limited liability, as the U.S. in accordance with the proper shipping label. Delivery outside the U.S. is subject to local laws.

BEFORE THE CLAIMS PANEL OF THE
STATE UNIVERSITIES RETIREMENT SYSTEM
CHAMPAIGN, ILLINOIS 61820

IN THE MATTER OF)

TYRONE CAVITT,)

) No. 2013-13

RECEIVED

MAY 21 2014

STATE UNIV. RET. SYS.

CLAIMS PANEL DECISION

On February 26, 2014, a hearing was held before the Claims Panel of the State Universities Retirement System (hereinafter SURS). This is the continuation of a claim that was previously heard on August 27, 2013. 135 pages of written records were admitted into evidence.

This case involves a worker's compensation offset issue arising under 40 ILCS 5/15-153.1(c) which provides:

"a deduction shall be made equivalent to any benefits payable to any employee under any State or Federal Worker's Compensation or Occupational Diseases Acts for any period for which disability benefits are payable."

The claimant was paid SURS disability benefits for during the period of 3-15-08 through 8-31-12. Mr. Cavitt was also awarded worker's compensation benefits in Case 06-WC-11546. In that claim, he received temporary total disability benefits of \$317.18 per week for 127.28 weeks for the period of 3-21-06 through 10-28-08. He was then awarded permanent total disability benefits of \$404.37 per week beginning 10-29-2008. Those benefits are payable for life. Claimant was notified by SURS that he has been overpaid benefits of \$59,837.27 representing SURS disability payments for the period of 3-15-08 through 8-31-12. SURS is entitled to recoup those offset benefits under 40 ILCS 5/15-153.1(c) since the claimant received SURS disability benefits for the same period of time that he was receiving weekly worker's compensation disability benefits.

The claimant has asked that the entire overpayment be forgiven. He argues that he was not promptly notified of the overpayment/offset issue. The claimant does not contend that SURS calculations are wrong. He simply argues that he should not be required to repay the offset. He

also claims personal hardship. The fact that the claimant would be required to repay SURS benefits received during the same time that he was receiving worker's compensation benefits should come as no surprise to the claimant. On 3-27-2009, the claimant signed a reimbursement agreement acknowledging that he might eventually be required to repay any SURS disability benefits received for these same periods of time for which he was receiving worker's compensation benefits. (R. 72)

SURS Director of Member Services, Angie Lieb, testified at the 2-26-14 hearing before the Claims Panel. Lieb explained how the calculations in this case were figured. According to Lieb, the calculation of the offset is accurate at \$59,837.21. Lieb's testimony is accepted as credible. Claimant's argument as to why he should not be required to pay the offset are not persuasive. The Illinois Pension Code specifically authorizes SURS to recoup any SURS disability payments which duplicate worker's compensation disability payments made during the same period of time. The Claims Panel finds that SURS is entitled to recoup the entire \$59,837.21 offset. Staff is directed to recoup the overpayment on an 8 year repayment schedule. Claimant's appeal is hereby denied.

Respectfully submitted,

THE CLAIMS PANEL OF THE STATE
UNIVERSITIES RETIREMENT SYSTEM

DATED: May 21, 2014

By: 
Daniel L. Gaumer
Hearing Officer

Bill Mabe
Andrew Matthews

RECEIVED

MAY 21 2014

STATE UNIV. RET. SYS.

Joint Committee on Administrative Rules

ADMINISTRATIVE CODE

TITLE 80: PUBLIC OFFICIALS AND EMPLOYEES

SUBTITLE D: RETIREMENT SYSTEMS

CHAPTER II: STATE UNIVERSITIES RETIREMENT SYSTEM

PART 1600 UNIVERSITIES RETIREMENT

SECTION 1600.500 ADMINISTRATIVE STAFF DETERMINATIONS AND RULES FOR APPEAL - NATURE AND REQUIREMENTS OF FORMAL HEARINGS

Section 1600.500 Administrative Staff Determinations and Rules for Appeal – Nature and Requirements of Formal Hearings

- a) **Administrative Determination**
The Board of Trustees hereby delegates to the SURS administrative staff the responsibility for the daily claims-processing function of SURS, including making initial determinations as to all applications for annuities and benefits, service credit, or any other claims against or relating to SURS, consistent with the provisions of the Illinois Pension Code.
- b) **Review by Director of Member Services**
Any participant, annuitant or beneficiary adversely affected by the disposition of a claim by the administrative staff may file a written request for review by the SURS Director of Member Services or such other person as may be designated by the Executive Director. The designee shall have all the powers and duties of the Director of Member Services, as set forth in this subsection (b). A request for review by the Director of Member Services must be received within 35 days from the date of the decision from which review is sought. The Director of Member Services' review will be based upon all materials contained in the file, as well as any additional materials the claimant attaches to the written request for review filed with the Director of Member Services pertaining to the claim. All filings or submissions, whether optional or required under this Section, shall be considered timely if date stamped by SURS within the time prescribed. The Director of Member Services' decision shall be served on the participant, annuitant or beneficiary by delivery to a third-party commercial carrier or by registered or certified mail, return receipt requested.
- c) **Review by the Claims Panel**
 - 1) A Claims Panel shall hear all administrative contested matters. The Panel shall meet periodically as determined by the Executive Director.
 - 2) **Request for Review.** Any participant, annuitant or beneficiary (hereinafter "claimant") adversely affected by the disposition of a claim by the Director of Member Services may request, in writing, a review by the Claims Panel and, at the same time, a copy of all relevant documents from the claimant's

- file. A request for review must be received by the General Counsel of SURS, or his or her designee, within 35 days from the date of the decision from which review is sought.
- 3) **Notice of Hearing.** Upon receipt of a claimant's Request for Review, the Director of Member Services, or his or her designee, shall assign the claim a docket number; schedule the claim for the first available meeting of the Claims Panel; and notify the claimant, by a Notice of Hearing, that he or she is required to file a single Statement of Claim. The Notice of Hearing may be accompanied by any relevant documentation from the claimant's file.
 - 4) **Statement of Claim.** The Statement of Claim must be received by the SURS General Counsel, or his or her designee, no later than 35 days from the date of the mailing of the Notice of Hearing. The Statement of Claim shall include: a formal Appearance, containing the claimant's name, SURS identification number and address; the name and address of the claimant's authorized representative, if any; a statement of the facts forming the basis for the appeal; any documents or other materials the claimant wishes to be considered in conjunction with the appeal, in addition to those already contained in the claimant's file; whether the claimant desires a hearing or whether the claimant desires to waive a hearing and allow the Claims Panel to reach a decision based upon the Statement of Claim and the relevant documents in the claimant's file; a list of witnesses, if any, the claimant intends to present at a hearing; and an explanation of the relief sought. The Statement of Claim shall not exceed 15 pages in length, unless an exception is granted by the Claims Panel Hearing Officer. The Hearing Officer may grant a motion to Strike/Dismiss all or part of the Statement of Claim.
 - 5) **Response to Statement of Claim.** SURS staff may submit a Response to the Statement of Claim, which shall also not exceed 15 pages in length, unless an exception is granted by the Claims Panel Hearing Officer.
 - 6) **Notification.** The Notice of Hearing shall also provide a claimant *with written notice of: the date, time and place of the hearing; the subject matter of the hearing; and relevant procedural and substantive statutory and regulatory provisions* [5 ILCS 100/10-25]. The Notice shall inform the claimant that he or she will be afforded the opportunity to provide a statement of his or her position, present oral evidence, and conduct **examination and cross-examination** of witnesses as necessary for full and true disclosure of the facts. Notice shall also be given to the claimant that he or she is required to provide written confirmation, at least 14 days prior to the scheduled date of the hearing, of his or her intent to appear at the hearing, whether in person or by telephone conference call. The claimant is not required to physically appear at the hearing. The claimant may appear at the hearing by telephone conference call. The claimant may also choose to affirmatively waive his or her appearance at the hearing. In the absence of the claimant, the Claims Panel will consider the claimant's Statement of Claim and such other matters as may be properly brought before it at the hearing.
 - 7) **Pre-hearing Conference.** Upon request of the General Counsel or upon the

decision of the Hearing Officer, a pre-hearing conference shall be held for the purpose of simplification or definition of issues or procedures at the hearing.

- 8) **Representation.** The claimant and SURS may be represented by counsel or a designated spokesperson at the hearing.
- 9) **Burden of Proof.** It shall be the burden of the claimant to establish a right to the benefit claimed, or the right to the continuation of the benefit claimed in cases of revocation of the benefit by SURS, by establishing that right by a preponderance of the evidence.
- d) **Discovery.** All discovery is at the discretion of the Hearing Officer. Requests to take discovery must be made in writing to the Hearing Officer with notice to the other party. Discovery may be taken with the prior permission of the Hearing Officer only upon good cause shown, that is, if the evidence sought is material and cannot be obtained in any other way. Failure to comply with orders of the Hearing Officer may be sanctioned by the Hearing Officer, by means including, but not limited to, dismissal of a claim.
- e) **Depositions**
 - 1) The Hearing Officer may order the taking of evidence depositions of a person, specifying the subject matter to be covered, under oral examination or written questions, for use as evidence at the hearing, provided:
 - A) The Hearing Officer has determined upon request that there is a need to preserve a person's testimony. The need to preserve a person's testimony shall be determined using criteria similar to that set forth under Illinois Supreme Court Rule 212(b);
 - B) The request is made on motion by a party who gives notice of the motion to the other party; and
 - C) The Hearing Officer has determined that an evidence deposition containing oral testimony will be necessary to the Claims Panel in determining the merits of the claim.
 - 2) The taking of depositions shall be in accordance with the provisions for taking depositions in civil cases, and the order for the taking of a deposition may provide that any designated books, papers, documents or tangible objects that are not privileged shall be produced at the same time and place.
 - 3) Any party to the hearing shall, during any deposition process, have the right to confront and cross-examine any witness whose deposition testimony is to be presented to the Claims Panel.
 - 4) Depositions shall be taken in the county of residence or employment of the witness, unless the witness waives that right in writing.
 - 5) Depositions shall be taken at the cost of the party requesting the deposition.

f) Subpoenas

- 1) The Hearing Officer may request the Secretary of the Board to issue a subpoena to compel the attendance of a witness at an evidence deposition or the production of documents when the witness has, or such documents contain, relevant evidence. A party may also request the Hearing Officer to request the Secretary of the Board to issue a subpoena to compel the attendance of a witness at an evidence deposition or the production of documents. The request shall either be in writing or on the record and shall:
 - A) Identify the witness or document sought; and
 - B) State the facts that will be proven by each witness or document sought.
- 2) The Hearing Officer shall grant or deny the request, either in writing or on the record. If the request for subpoena is granted, the Hearing Officer shall, if necessary, reschedule the hearing to a specific date. The request for subpoena shall be denied if the Hearing Officer finds that the evidence sought is immaterial, irrelevant or cumulative. If the request for subpoena is denied, the specific reasons for denial of the request shall be made part of the record on appeal.
- 3) If a witness fails to obey a subpoena, the party seeking enforcement of the subpoena shall prepare an application to the circuit court of the county in which the subpoenaed witness resides requesting enforcement of the subpoena, and shall present the application to the Hearing Officer, at the same time serving a copy of the application upon the other party. If satisfied that the subpoena was properly served and that the application is in proper form, the Hearing Officer shall sign a subpoena to be submitted with the application and the party seeking the subpoena may then file and prosecute the application in the circuit court, in the name of the Board. The petitioner in the application shall be styled as "Name of Petitioner ex rel. Board of Trustees of the State Universities Retirement System of Illinois" unless the petitioner is SURS, in which case the petition shall be brought in the name of the Board. In the event of an application being filed with the circuit court, the matter shall be continued pending the outcome of the application to enforce the subpoena.
- 4) The fees of witnesses for attendance and travel shall be the same as fees of witnesses before the circuit courts of this State and shall be paid by the party seeking the subpoena.

g) Conduct of the Hearing

- 1) Hearing Officer. The hearing shall be conducted by the Hearing Officer. Other members of the Claims Panel may, but are not required to, attend the hearing. Members may attend hearings either in-person or by video or teleconference.
 - A) The Hearing Officer shall have full power to conduct the hearing and

the presence of any other members of the Claims Panel is not required. The Hearing Officer shall be one of the members of the Claims Panel chosen by the Panel to be the Hearing Officer.

- B) The Claims Panel shall consist of:
 - i) the Executive Director of SURS;
 - ii) an attorney licensed to practice law in the State of Illinois approved by the Board; and
 - iii) one other person, selected by the Chairperson of the Board of Trustees of SURS, who shall be a member of the Board, a participant in SURS or an attorney licensed to practice law in the State of Illinois.
- C) Each member of the Panel shall be reimbursed for travel or other related expenses incurred in connection with his or her duties as a member of the Panel. If he or she is not a member of the Board or currently employed by one of the employers covered by SURS, the member shall receive reasonable compensation, as recommended by the Executive Director and approved by the Board, for time spent in reviewing claims and attending Panel hearings. At a minimum, the members of the Claims Panel shall have a general familiarity with the provisions of the Illinois Pension Code, this Part and the internal operating procedures of SURS.

2) Procedures

- A) The Hearing Officer shall conduct a full and fair hearing, receive testimony of the claimant and admit exhibits into evidence, avoid delay, maintain order and make a sufficient record for a full and true disclosure of the facts and issues.
- B) To accomplish these ends, the Hearing Officer shall make all procedural and evidentiary rulings necessary for the conduct of the hearing.
- C) All testimony shall be taken under oath before an officer authorized to administer oaths by the laws of this State or of the United States or of the place where the testimony is to be given.
- D) *As a general matter, the rules of evidence as applied in civil cases in the circuit courts of the State of Illinois shall be followed; however, evidence inadmissible under those rules may be admitted (except where precluded by statute) if it is of a type commonly relied upon by reasonably prudent persons in the conduct of their affairs. Any part of the evidence may be received in written form, provided that the interests of the parties will not be prejudiced. Notice may be taken of generally recognized technical facts within SURS' specialized knowledge and SURS' experience, technical competence and*

specialized knowledge may be used in evaluation of the evidence. [5 ILCS 100/10-40]

- E) The Hearing Officer, and any member of the Claims Panel attending the hearing, may ask questions necessary for better understanding of the facts or law.
 - F) The Hearing Officer shall have the authority to impose reasonable time limits for each party to present its case and shall, in general, have the power to manage and control the hearing process.
 - G) The hearing shall be open to the public unless the Hearing Officer, for good cause shown, determines otherwise.
- 3) Record of Proceedings. Two records of proceedings shall be kept that shall be in the form of:
- A) a non-verbatim "bystander's report"; and
 - B) either a stenographic transcription or a tape recording. The claimant may obtain a stenographic transcription or a copy of a tape recording of the hearing by making a timely request within 21 days after the close of the hearing and paying the actual cost entailed.
- 4) Disqualification; Ex Parte Communications
- A) Disqualification
 - i) *A Hearing Officer or other member of the Claims Panel may be disqualified on grounds of bias or conflict of interest. A motion to disqualify a Hearing Officer or other member of the Claims Panel for bias or conflict of interest shall be made to the Hearing Officer by any party to the hearing at least 14 days prior to the commencement of the hearing, with a copy of the motion to be simultaneously submitted to the General Counsel. The motion shall be heard, considered and ruled upon by the Hearing Officer at or prior to the commencement of the hearing. The movant shall have the burden of proof with respect to the motion to disqualify. Either an adverse ruling or the fact that a Hearing Officer or other member of the Claims Panel is an employee of SURS or has a contract with SURS, standing alone, shall not constitute bias or conflict of interest.* [5 ILCS 100/10-30]
 - ii) The Executive Director may not be called as a witness unless it is demonstrated that the Executive Director has relevant noncumulative personal knowledge of facts bearing upon the claim. The Executive Director may not be disqualified as a member of the Claims Panel on the basis that the Executive Director is responsible for the overall administration of SURS.

- iii) In the event that a Hearing Officer or other member of the Claims Panel is disqualified or is otherwise unable to serve, the Board Chairperson may appoint another person to the Claims Panel and shall appoint another person if the Claims Panel is reduced to fewer than two members, or the Claims Panel shall appoint another Hearing Officer from among its members, as the case may be.
 - B) *Ex Parte Communications Prohibited. Except in the disposition of matters that SURS is authorized by law to entertain or dispose of on an ex parte basis, the members of the Claims Panel shall not, after receiving notice of a hearing in a contested matter, communicate, directly or indirectly, in connection with any issue of fact, with any party, or in connection with any other issue with any party, or the representative of any party, except upon notice and opportunity for all parties to participate. However, an employee of SURS may communicate with other employees of SURS and an employee of SURS or member of the Claims Panel may have the aid and advice of one or more assistants. An ex parte communication received by any member of the Claims Panel shall be made a part of the record of the pending matter, including all written communications, all written responses to the communications, and a memorandum stating the substance of all oral communications and all responses made and the identity of each person from whom the ex parte communication was received. Communications regarding matters of procedure and practice, such as the format of pleadings, number of copies required, manner of service, and status of proceedings, are not considered ex parte communications. [5 ILCS 100/10-60]*
- 5) Decisions of the Claims Panel and Executive Committee
 - A) Claims Panel Decisions
 - i) The record of proceedings shall be completed upon conclusion of the hearing by the Hearing Officer, unless the Hearing Officer determines to re-open the proceedings. Upon conclusion of all evidence and arguments, the Claims Panel shall privately deliberate and make a Decision as to the disposition of the claim based on the evidence of record. The Claims Panel Decision shall be served on all parties and their agents, if any, by delivery to a third-party commercial carrier or by registered or certified mail, return receipt requested. If a Statement of Exceptions to the Decision is not filed pursuant to this subsection (g)(5)(A), the Decision is final for all purposes and not subject to administrative or judicial review. However, if a Statement of Exceptions to the Decision is filed or, if the members of the Panel are unable to agree on a Decision, then the claim shall be presented to the Executive Committee for a final administrative decision.

- ii) If a Statement of Exceptions is filed, it must be received by SURS, along with a brief in support, within 21 days after the date of mailing of the Claims Panel Decision. Any responsive brief shall be received within 21 days after the filing of the Statement of Exceptions. Any reply brief shall be received within 14 days after the filing of the responsive brief. The filing of any responsive or reply brief is optional. The Executive Director, or his or her designee, shall provide the Executive Committee with a summary of the decision of the Claims Panel. The Executive Committee will make a final administrative decision based on the Claims Panel Decision, any dissenting opinion, any Statement of Exceptions and briefs properly filed.
- iii) If the claim is presented to the Executive Committee because the members of the Claims Panel are unable to agree on a Decision, the Executive Committee shall make a final administrative decision based on any opinions of the Claims Panel members, the record and any briefs properly filed by the claimant or SURS. The filing of any opening, responsive or reply brief in response to the Claims Panel decision is optional. Any opening brief shall be received by SURS within 21 days after receiving notification from the Hearing Officer that the Claims Panel was unable to agree on a Decision. Any responsive brief shall be received within 21 days after the filing of any opening brief. Any reply brief shall be received within 14 days after the filing of any responsive brief.
- iv) All filings shall be served upon the opposing party and shall contain a certificate of service. Filing deadlines in this subsection (g)(5)(A) may be continued to a date certain by the Hearing Officer for good cause shown on written application filed with SURS prior to the expiration of the deadline sought to be continued.

B) Executive Committee Decision

- i) When necessary pursuant to subsection (g)(5)(A), the Executive Committee of the Board shall make a decision on the claim. No oral argument shall be permitted before the Executive Committee unless otherwise determined by the Executive Committee.
- ii) The Executive Committee shall render one of the following decisions with respect to the claim: affirmance of the administrative action, reversal of the administrative action, or remand of the case to the administrative staff for further consideration. Remand of the case to the administrative staff shall not be considered a final decision of the Executive Committee. A decision by the Executive Committee either

reversing or affirming the decision of the administrative staff shall constitute a final decision for the purpose of review under the Administrative Review Law [735 ILCS 5/Art. III]. *A final decision of the Executive Committee shall be in writing or stated in the record.*

- iii) The Executive Committee may adopt, as its own, the findings of fact and conclusions of law of the Claims Panel. *Findings of fact, if set forth in statutory language, shall be accompanied by a concise and explicit statement of the underlying facts supporting the findings.*
- iv) *All decisions of the Executive Committee shall specify whether they are final and subject to the Administrative Review Law. [5 ILCS 100/10-50]*
- v) Parties and their agents, if any, shall be notified, personally, by delivery to a third-party commercial carrier, or by registered or certified mail, return receipt requested, of any decision of the Executive Committee. The date of mailing of the decision shall constitute the date of service for purposes of the Administrative Review Law or any other applicable law.

(Source: Amended at 38 Ill. Reg. 5659, effective February 11, 2014)

**State Universities Retirement System of Illinois**

Serving Illinois Community Colleges and Universities

1901 Fox Drive • Champaign, IL 61820-7333

1-800-ASK SURS

(217) 378-9800 (FAX)

(217) 378-8800 (C-U)

www.surs.org

June 23, 2014

Mr. Tyrone Cavitt
Member ID# 

Dear Mr. Cavitt:

During a recent review of your records, we have discovered that an overpayment in the amount of \$59,837.21 exists on your account. We will recover the overpayment in the following manner: a deduction in the amount of \$623.30 will be withheld from your benefit payment each month, beginning on 08/01/2014. Interest charges will be applied monthly based on the fiscal year effective rate of interest on any unpaid balance.

Confirmation of the above agreement is required. If no response is received, we will begin to withhold the overpayment as outlined above. Please sign and return this letter. A self-addressed, return envelope is provided for your convenience. If you have any questions concerning this matter, please contact a SURS Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,

Member Services

I, Tyrone Cavitt, do hereby agree to the above repayment schedule.

Signature_____
Date

PATA



1901 Fox Drive, Champaign, IL 61820-7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

November 12, 2020

Estate of Tyrone F Cavitt
 [REDACTED]

RE: Tyrone F Cavitt, deceased
 Member ID#: [REDACTED]

Dear Estate of Tyrone F Cavitt:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Tyrone Cavitt that Tyrone Cavitt has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Tyrone Cavitt passed away on 08/07/2020; therefore, his retirement annuity was payable through August 2020.

At the time we were informed of his death, we had already sent his September 2020 retirement annuity payment to his checking account with Scott Credit Union through electronic transfer. The total amount of the deposit was:

1. September 2020 Sent On: 09/01/2020 Amount Sent: \$1,308.37

Total Amount Sent: \$1,308.37

We have contacted Scott Credit Union for the return of this deposit, but they are unable to return the funds to us; therefore, he has been overpaid an \$1,308.37 for this month's benefit.

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

In addition, prior to his retirement, he received disability benefits; however, he was overpaid for these benefits due to a worker's compensation settlement he received. The overpayment was originally \$59,837.21. At the time of his death, the remaining overpayment balance was \$14,336.31.

At this time, we are requesting that the executor of the Estate of Tyrone Cavitt return the balance of \$15,644.68 (\$14,336.31 + \$1,308.37) to our office in the envelope provided.

If you are not the executor of the Estate of Tyrone Cavitt, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.

(Page 2 of 2)

Estate of Tyrone F Cavitt
November 12, 2020
Page 2

If you have any questions concerning this matter, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,

Member Service Division



1901 Fox Drive, Champaign, IL 61820-7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
www.surs.org

February 21, 2022

The Estate of Tyrone F Cavitt

Member ID#: [REDACTED]

Dear Estate of Tyronne F Cavitt:

On November 12, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,308.37 and the balance of a previous overpayment in the amount of \$14,336.31. Including all payments that have been made, the current amount due this system is \$14,644.68. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$14,644.68 to our office by **March 23, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by March 23, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



1901 Fox Drive, Champaign, IL 61820 7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

July 12, 2018

Estate of Gregory T Chapman
 [REDACTED]

RE: Gregory T Chapman, Deceased
 Member ID#: [REDACTED]

Dear Estate of Gregory T Chapman:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Gregory T Chapman that Gregory T Chapman has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Gregory T Chapman passed away on January 22, 2018; therefore, his retirement annuity was payable through January 2018.

At the time we were informed of his death, we had already sent his February 2018 through April 2018 retirement annuity payments to his checking account with USAA Federal Savings Bank through electronic transfer. The total amount of each deposit was:

1. February 2018	Sent On: 02/01/2018	Amount Sent: \$3,211.81
2. March 2018	Sent On: 03/01/2018	Amount Sent: \$3,211.81
3. April 2018	Sent On: 04/01/2018	Amount Sent: \$3,211.81

Total Amount Sent: \$9,635.43

We have contacted USAA Federal Savings Bank for the return of these deposits but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Gregory T Chapman return the balance of \$9,635.43 to our office in the envelope provided.

If you are not the executor of the Estate of Gregory T Chapman, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

(Page 2 of 2)

Estate of Gregory T Chapman
July 12, 2018
Page 2

Sincerely yours,



Kellen C. Brown
Member Service Representative



1901 Fox Drive, Champaign, IL 61820-7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

April 16, 2021

The Estate of Gregory Chapman
 C/o Shawn Matthews

Member ID# [REDACTED]

The Estate of Gregory Chapman:

On July 12, 2018, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$9,635.43. Including payments that have been made, the current amount due this system is \$8,635.43. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$8,635.43 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



1901 Fox Drive, Champaign, IL 61820 7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

December 7, 2020

Estate of Ola D Coleman
 c/o Deborah Culbreth
 [REDACTED]

RE: Ola D Coleman, deceased
 Member ID# [REDACTED]

Dear Estate of Ola D Coleman:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Ola D Coleman that Ola D Coleman has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Ola D Coleman passed away on 04/13/2020; therefore, her retirement annuity was payable through April 2020.

At the time we were informed of her death, we had already sent her May 2020 retirement annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. May 2020 Sent On: 05/01/2020 Amount Sent: \$1,212.69

Total Amount Sent: \$1,212.69

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Ola D Coleman return the balance of \$1,212.69 to our office in the envelope provided.

If you are not the executor of the Estate of Ola D Coleman, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 16, 2021

The Estate of Ola Coleman
 C/o Deborah Culbreth

Member ID#: [REDACTED]

The Estate of Ola Coleman:

On December 7, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,212.69. Including payments that have been made, the current amount due this system is \$212.69. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$212.69 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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June 1, 2020

Estate of Clark Cunningham
 C/o Nathalie Cunningham
 [REDACTED]

RE: Clark Cunningham, deceased
 Member ID# [REDACTED]

Dear Estate of Clark Cunningham:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Clark Cunningham that Clark Cunningham has been overpaid for the retirement annuity and survivor annuity he was receiving from SURS at the time of his death. SURS pays retirement and survivor annuities through the month in which the member passes away. We were informed that Clark Cunningham passed away on April 18, 2020; therefore, his retirement and survivor annuities were payable through April 2020.

At the time we were informed of his death, we had already sent his May 2020 retirement and survivor annuity payments to his checking account with Busey Bank through electronic transfer. The total amount of the deposit was:

1. May 2020 (Retirement)	Sent On: 05/01/2020	Amount Sent: \$4,619.88
2. May 2020 (Survivor)	Sent On: 05/01/2020	Amount Sent: \$2,793.27

Total Amount Sent: \$7,413.15

We have contacted Busey Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Clark Cunningham return the balance of \$7,413.15 to our office in the envelope provided.

If you are not the executor of the Estate of Clark Cunningham, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 16, 2021

The Estate of Clark Cunningham
 C/o Nathalie Cunningham

Member ID# [REDACTED]

The Estate of Clark Cunningham:

On June 1, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement and survivor benefits totaling \$7,413.15. Including the payments that have been made, the current amount due this system is \$6,413.15. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$6,413.15 to our office by **May 17, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 17, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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February 16, 2021

Estate of Mae Davis
 [REDACTED]

RE: Mae Davis, deceased
 Member ID# [REDACTED]

Dear Estate of Mae Davis:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Mae Davis that Mae Davis has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Mae Davis passed away on 11/27/2020; therefore, her retirement annuity was payable through November 2020.

At the time we were informed of her death, we had already sent her December 2020 retirement annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. December 2020	Sent On: 12/01/2020	Amount Sent: \$1,513.41
		Total Amount Sent: \$1,513.41

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Mae Davis return the balance of \$1,513.41 to our office in the envelope provided.

If you are not the executor of the Estate of Mae Davis, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 6, 2022

Estate of Mae Davis

Member ID# [REDACTED]

To Whom It May Concern:

On February 16, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,513.41. Including all payments that have been made, the current amount due this system is \$513.41. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$513.41 to our office by **February 5, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 5, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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April 22, 2019

The Estate of Lillian Decker
 [REDACTED]

RE: Lillian Decker, deceased
 Member ID# [REDACTED]

Dear Estate of Lillian Decker:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Lillian Decker that Lillian Decker has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the survivor passes away. We were recently informed that Lillian Decker passed away on September 28, 2018; therefore, her survivor annuity was payable through September 2018.

At the time we were informed of her death, we had already sent her October 2018 – February 2019 survivor annuity payments to her checking account with Desert Schools Federal Credit Union through electronic transfer. The total amount of the deposit was:

1. October 2018	Sent On: 10/01/2018	Amount Sent: \$2,676.60
2. November 2018	Sent On: 11/01/2018	Amount Sent: \$2,676.60
3. December 2018	Sent On: 12/01/2018	Amount Sent: \$2,676.60
4. January 2019	Sent On: 01/01/2019	Amount Sent: \$2,767.62
5. February 2019	Sent On: 02/01/2019	Amount Sent: \$2,767.62

Total Amount Sent: \$13,565.04

We have contacted Desert Schools Federal Credit Union for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Lillian Decker return the balance of \$13,565.04 to our office in the envelope provided.

If you are not the executor of the Estate of Lillian Decker, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

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(Page 2 of 2)

The Estate of Lillian Decker
April 22, 2019
Page 2

If you have any questions, please contact a Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

A handwritten signature in cursive script, appearing to read "Sara Gutknecht", is written over a white rectangular background. This white background is positioned on the left side of a large, solid black rectangular redaction box that spans the width of the page.

Sara Gutknecht
Member Service Representative



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 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
www.surs.org

April 23, 2021

The Estate of Lillian Decker

Member ID# [REDACTED]

The Estate of Lillian Decker:

On April 22, 2019, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$13,565.04. The current amount due this system is \$13,565.04. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$13,565.04 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 4, 2021

Estate of Adalyne Downings
 [REDACTED]

RE: Adalyne Downings, deceased
 Member ID# [REDACTED]

Dear Estate of Adalyne Downings:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Adalyne Downings that Adalyne Downings has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Adalyne Downings passed away on March 16, 2021; therefore, her survivor annuity was payable through March 2021.

At the time we were informed of her death, we had already sent her April 2021 survivor annuity payment to her checking account with AmSouth Bank through electronic transfer. The total amount of the deposit was:

1. April 2021	Sent On: 04/01/2021	Amount Sent: \$218.15
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Total Amount Sent: \$218.15

We have contacted AmSouth Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Adalyne Downings return the balance of \$218.15 to our office in the envelope provided.

If you are not the executor of the Estate of Adalyne Downings, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 6, 2022

Estate of Adalyne Downings

Member ID#: [REDACTED]

To Whom It May Concern:

On August 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$218.15. The current amount due this system is \$218.15. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$218.15 to our office by **February 5, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 5, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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February 21, 2020

Clerk Of Circuit Ct of Sangamon County
 [REDACTED]

RE: James Duda, deceased
 Member ID#: [REDACTED]
 Account: [REDACTED]

Dear Clerk Of Circuit Ct of Sangamon County:

The State Universities Retirement System (SURS) is sending this letter to inform the payee that James Duda has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that James Duda passed away on December 22, 2019; therefore, his retirement annuity was payable through December 2019.

At the time we were informed of his death, we had already sent his January 2020 retirement annuity payment. The total amount of the check was:

1. January 2020 Sent On: 01/01/2020 Amount Sent: \$1,723.48

Total Amount Sent: \$1,723.48

At this time, we are requesting that the balance of \$1,723.48 be returned to our office in the envelope provided.

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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May 12, 2021

Clerk of Circuit Ct of Sangamon County

Member ID# [REDACTED]

The Clerk of Circuit Ct of Sangamon County:

On February 21, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,723.48. The current amount due this system is \$1,723.48. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,723.48 to our office by **June 11, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by June 11, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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September 21, 2020

Estate of Earline Dunn-El
 [REDACTED]

RE: Earline Dunn-El
 Member ID#: [REDACTED]

Dear Estate of Earline Dunn-El:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Earline Dunn-El that Earline Dunn-El has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Earline Dunn-El passed away on June 12, 2020; therefore, her retirement annuity was payable through June 2020.

At the time we were informed of her death, we had already sent her July 2020 retirement annuity payment to her checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. July 2020 Sent On: 07/01/2020 Amount Sent: \$1,749.03

Total Amount Sent: \$1,749.03

We have contacted US Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Earline Dunn-El return the balance of \$1,749.03 to our office in the envelope provided.

If you are not the executor of the Estate of Earline Dunn-El, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 23, 2021

The Estate of Earline Dunn El
 [REDACTED]

Member ID#: [REDACTED]

The Estate of Earline Dunn El:

On September 21, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,749.03. Including the payments that have been made, the current amount due this system is \$749.03. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$749.03 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 12, 2020

Estate of Mitzi L. Duxbury

RE: Mitzi Duxbury, deceased
 Member ID# [REDACTED]

Dear Estate of Mitzi L. Duxbury:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Mitzi Duxbury that Mitzi Duxbury has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Mitzi Duxbury passed away on February 1, 2020; therefore, her retirement annuity was payable through February 2020.

At the time we were informed of her death, we had already sent her March 2020 retirement annuity payment to her savings account with University of Wisconsin Credit Union through electronic transfer. The total amount of the deposit was:

1. March 2020 Sent On: 03/01/2020 Amount Sent: \$2,362.12

Total Amount Sent: \$2,362.12

We have contacted University of Wisconsin Credit Union for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Mitzi Duxbury return the balance of \$2,362.12 to our office in the envelope provided.

If you are not the executor of the Estate of Mitzi Duxbury, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 23, 2021

The Estate of Mitzi Duxbury

Member ID# [REDACTED]

The Estate of Mitzi Duxbury:

On May 12, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,362.12. Including the payments that have been made, the current amount due this system is \$1,362.12. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,362.12 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 28, 2020

Estate of William Epps
 [REDACTED]

RE: William Epps, deceased
 Member ID#: [REDACTED]

Dear Estate of William Epps:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of William Epps that William Epps has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that William Epps passed away on 04/27/2020; therefore, his survivor annuity was payable through April 2020.

At the time we were informed of his death, we had already sent his May 2020 survivor annuity payment to his checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. May 2020	Sent On: 05/01/2020	Amount Sent: \$301.79
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Total Amount Sent: \$301.79

We have contacted US Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of William Epps return the balance of \$301.79 to our office in the envelope provided.

If you are not the executor of the Estate of William Epps, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

Member Service Division

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April 23, 2021

The Estate of William Epps

Member ID#:

The Estate of William Epps:

On July 28, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$301.79. The current amount due this system is \$301.79. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$301.79 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 25, 2021

Estate of Gladys Feliciano
 C/O Ramon Santiago
 [REDACTED]

RE: Gladys Feliciano, deceased
 Member ID#: [REDACTED]

Dear Estate of Gladys Feliciano:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Gladys Feliciano that Gladys Feliciano has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Gladys Feliciano passed away on July 28, 2021; therefore, her survivor annuity was payable through July 2021.

At the time we were informed of her death, we had already sent her August 2021 survivor annuity payment to her checking account with Harris Bank through electronic transfer. The total amount of the deposit was:

1. August 2021	Sent On: 08/01/2021	Amount Sent: \$1,140.65
		Total Amount Sent: \$1,140.65

We have contacted Harris Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Gladys Feliciano return the balance of \$1,140.65 to our office in the envelope provided.

If you are not the executor of the Estate of Gladys Feliciano, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 13, 2022

Estate of Gladys Feliciano
 C/O Ramon Santiago
 [REDACTED]

Member ID#: [REDACTED]

Dear Estate of Gladys Feliciano:

On August 25, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,140.65. The current amount due this system is \$1,140.65. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,140.65 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 28, 2021

Estate of Sally J Fenton
 c/o Kathy Scharko
 [REDACTED]

RE: Sally J Fenton, deceased
 Member ID# [REDACTED]

Dear Estate of Sally J Fenton:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Sally Fenton that Sally Fenton has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Sally Fenton passed away on 07/16/2020; therefore, her survivor annuity was payable through July 2020.

At the time we were informed of her death, we had already sent her August 2020 survivor annuity payment to her checking account with Bridgeview Bank through electronic transfer. The total amount of the deposit was:

1. August 2020 Sent On: 08/01/2020 Amount Sent: \$537.57

Total Amount Sent: \$537.57

We have contacted Bridgeview Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Sally Fenton return the balance of \$537.57 to our office in the envelope provided.

If you are not the executor of the Estate of Sally Fenton, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

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Sincerely yours,

Member Service Division

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January 13, 2022

Estate of Sally Fenton
 C/O Kathy Scharko
 [REDACTED]

Member ID# [REDACTED]

Dear Estate of Sally Fenton:

On July 28, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$537.57. The current amount due this system is \$537.57. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$537.57 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 29, 2021

Estate of David Franklin
 [REDACTED]

RE: David Franklin, deceased
 Member ID#: [REDACTED]

Dear Estate of David Franklin:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of David Franklin that David Franklin has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that David Franklin passed away on September 16, 2020; therefore, his survivor annuity was payable through September 2020.

At the time we were informed of his death, we had already sent his October and November 2020 survivor annuity payments to his checking account with Busey Bank through electronic transfer. The total amount of the deposit was:

1. October 2020	Sent On: 10/01/2020	Amount Sent: \$780.56
2. November 2020	Sent On: 11/1/2020	Amount Sent: \$780.56

Total Amount Sent: \$1,561.12

We have contacted Busey Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of David Franklin return the balance of \$1,561.12 to our office in the envelope provided.

If you are not the executor of the Estate of David Franklin, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

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Sincerely yours,
 Member Service Division

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January 13, 2022

Estate of David Franklin

Member ID#: [REDACTED]

Dear Estate of David Franklin:

On July 29, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,561.12. The current amount due this system is \$1,561.12. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,561.12 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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 www.surs.org

October 6, 2020

Estate of Patsy J Griffith
 [REDACTED]

RE: Patsy Griffith, deceased
 Member ID#: [REDACTED]

Dear Estate of Patsy J Griffith:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Patsy J Griffith that Patsy Griffith has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Patsy Griffith passed away on 07/30/2020; therefore, her survivor annuity was payable through July 2020.

At the time we were informed of her death, we had already sent her August 2020 survivor annuity payment to her checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. August 2020	Sent On: 08/01/2020	Amount Sent: \$1,081.78
		Total Amount Sent: \$1,081.78

We have contacted US Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Patsy J Griffith return the balance of \$1,081.78 to our office in the envelope provided.

If you are not the executor of the Estate of Patsy J Griffith, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

Member Service Division

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May 24, 2021

Estate of Patsy Griffith
 [Redacted]

Member ID# [Redacted]

The Estate of Patsy Griffith:

On October 6, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,081.78. The current amount due this system is \$1,081.78. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,081.78 to our office by **June 23, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by June 23, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



1901 Fox Drive, Champaign, IL 61820-7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

August 9, 2018

Estate of Peter Haidu

RE: Peter Haidu, Deceased
 Member ID# [REDACTED]

Dear Estate of Peter Haidu:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Peter Haidu that Peter Haidu has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were recently informed that Peter Haidu passed away on February 7, 2017; therefore, his retirement annuity was payable through February 2017.

At the time we were informed of his death, we had already sent his March 2017 through September 2017 retirement annuity payments to his checking account with Wells Fargo Bank through electronic transfer. The total amount of each deposit was:

1. March 2017	Sent On: 03/01/2017	Amount Sent: \$2,834.52
2. April 2017	Sent On: 04/01/2017	Amount Sent: \$2,834.52
3. May 2017	Sent On: 05/01/2017	Amount Sent: \$2,834.52
4. June 2017	Sent On: 06/01/2017	Amount Sent: \$2,834.52
5. July 2017	Sent On: 07/01/2017	Amount Sent: \$2,834.52
6. August 2017	Sent On: 08/01/2017	Amount Sent: \$2,834.52
7. September 2017	Sent On: 09/01/2017	Amount Sent: \$2,834.52

Total Amount Sent: \$19,841.64

We have contacted Wells Fargo Bank for the return of these deposits but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Peter Haidu return the balance of \$19,841.64 to our office in the envelope provided.

If you are not the executor of the Estate of Peter Haidu, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

(Page 2 of 2)

Estate of Peter Haidu
August 9, 2018
Page 2

If you have any questions, please contact a Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

A handwritten signature in black ink, appearing to read 'Kellen C. Brown', with a long horizontal flourish extending to the right.

Kellen C. Brown
Member Service Representative



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April 23, 2021

The Estate of Peter Haidu

Member ID#: [REDACTED]

The Estate of Peter Haidu:

On July 5, 2018, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$19,841.64. Including the payments that have been made, the current amount due this system is \$18,841.64. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$18,841.64 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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(Page 2 of 3)

(Page 1 of 2)



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June 26, 2018

The Estate of Robert V Harnack

RE: Robert V Harnack, Deceased
 Member ID#: [REDACTED]

Dear Estate of Robert V Harnack:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Robert V Harnack that Robert V Harnack has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were recently informed that Robert V Harnack passed away on March 24, 2018; therefore, his retirement annuity was payable through March 2018.

At the time we were informed of his death, we had already sent his April 2018 retirement annuity payment to his checking account with Old National Bank through electronic transfer. The total amount of the deposit was:

1. April 2018 Sent On: 04/01/2018 Amount Sent: \$9,394.15

Total Amount Sent: \$9,394.15

We have contacted Old National Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Robert V Harnack return the balance of \$9,394.15 to our office in the envelope provided.

If you are not the executor of the Estate of Robert V Harnack, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

(Page 3 of 3)

(Page 2 of 2)

The Estate of Robert V Harnack
June 26, 2018
Page 2

A handwritten signature in black ink, appearing to read 'K. Brown', with a stylized flourish extending from the end.

Kellen C. Brown
Member Service Representative



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April 30, 2021

The Estate of Robert Harnack
 C/o Doug Harnack
 [REDACTED]

Member ID# [REDACTED]

The Estate of Robert Harnack:

On February 25, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$9,394.15. Including payments that have been made, the current amount due this system is \$8,394.15. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$8,394.15 to our office by **May 31, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 31, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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December 4, 2019

Mr. Josh Hess

Member ID#: [REDACTED]

Dear Mr. Hess:

SURS has been informed that you received Workers' Compensation (WC) Benefits from case #16 WC 017531. You received Temporary Total Disability (TTD) benefits from 08/06/2016 through 09/15/2017 in the amount of \$597.17 per week (or \$2,587.72 per month). You also received a lump sum amount of \$26,969.25 for Permanent Partial Disability (PPD) benefits.

Pursuant to Section 5/15-153.1 of the Illinois Compiled Statutes Chapter 40, SURS is entitled to offset disability benefits when an employee receives any benefits under a State or Federal Workers' Compensation or Occupational Diseases Act for the same period of time.

You received SURS disability benefits from 05/13/2017 through 02/28/2018 at a base rate of \$1,950.16 per month. When you first applied for SURS disability benefits, Southern Illinois University - Carbondale (SIUC) reported that your last day worked was 07/08/2016, that you had received WC temporary total disability (TTD) benefits through 05/05/2017, and that you received benefit pay from SIUC from 05/06/2017 through 5/12/2017 (5 working days). This caused the begin date of your SURS disability benefit to be 05/13/2017.

After we began paying you, you were awarded additional TTD benefits retroactively to 05/06/2017 through 09/15/2017. As a result, the benefit pay you received from SIUC from 05/06/2017 through 05/12/2017 (5 working days) should now apply to the period beginning 09/16/2017 (day after new TTD end date) through 09/22/2017. This changes the begin date of your SURS disability benefit from 05/13/2017 to 09/23/2017. Therefore, you have been overpaid for the disability benefits you received from 05/13/2017 through 09/22/2017.

In addition, SURS has reviewed the PPD benefits you received and has determined that there is an offset to the remaining SURS disability benefits you received. The offset was calculated as follows:

<u>Begin Date</u>	<u>End Date</u>	<u>Monthly Offset Amount</u>	<u>WC Benefit Type</u>
09/16/2017	09/03/2018	\$2,328.95	PPD

Begin Date of Offset: The date of your on-the-job accident was 04/15/2016. You received Temporary Total Disability (TTD) WC benefits through 09/15/2017. Therefore, the offset for Permanent Partial Disability (PPD) WC benefits begins the next day, or 09/16/2017. However, since your SURS disability benefit did not begin until 09/23/2017, there is no offset from 09/16/2017 through 09/22/2017.

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(Page 2 of 2)

Mr. Josh Hess
 December 4, 2019
 Page 2

End Date of Offset: The terms of the settlement indicate you received PPD for 30% loss of use of your left foot. Since the rate of PPD is equal to 60% of your average weekly wage, the weekly PPD amount would be \$537.51 (\$895.85 X 60%). The number of months the offset period will last is calculated as follows:

\$26,969.25	÷	\$537.51	=	50.17	÷	4.3333	=	11.58
Gross Amount of Settlement		Weekly PPD Amount		Weeks of Offset		Weeks per Month		Months of Offset

Therefore, the PPD offset period would end on 09/03/2018 (11.58 months after 09/16/2017). However, since your SURS disability benefit ended on 02/28/2018, there is no offset from 03/01/2018 through 09/03/2018.

Monthly Offset Amount: The monthly offset amount was calculated as follows:

\$26,969.25	÷	11.58	=	\$2,328.95
Net Amount of Settlement		Months of Offset		Monthly Offset Amount

Due to the adjustments and offset described above, your disability benefits have been overpaid by a total of \$11,769.22. Please send your remittance of \$11,769.22 made payable to the State Universities Retirement System in order to adjust for the overpayment. If payment is not received by 01/04/2020, interest on the balance due will be applied at the current effective rate.

STAFF DETERMINATION

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Benefits Counselor at 1-800-278-7877 or 217-378-8800 in the Champaign/Urbana area.

Sincerely,

Member Service Division



1901 Fox Drive, Champaign, IL 61820-7333
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www.surs.org

August 15, 2020

Mr. Josh Hess



Member ID#:



BILLING STATEMENT FOR RECOVERY OF OVERPAID BENEFITS

Statement Balance	\$12,067.99
Payments Received	.00
Interest Applied	\$60.73
Current Balance Due	\$12,128.72
Minimum Payment Due	\$201.13
Payment Due 09/01/2020	

Overpayment Recovery Remittance Form

Mr. Josh Hess

Member ID#



In order to ensure that your payments are applied promptly to your account, please include this page with your payment.

Please make checks payable to SURS.

FOR OFFICE USE ONLY

Date	_____	Amount	_____
Check #	_____	Account Credited	_____
Account#	_____	Agency	_____
Status	_____		





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September 15, 2020

Mr. Josh Hess



Member ID#



BILLING STATEMENT FOR RECOVERY OF OVERPAID BENEFITS

Statement Balance 08/15/2020	\$12,128.72
Payments Received	.00
Interest Applied	\$61.06
Current Balance Due	\$12,189.78
Minimum Payment Due	\$402.26
Payment Due 10/01/2020	

Your account is past due. Please remit the total amount due.

Overpayment Recovery Remittance Form

Mr. Josh Hess

Member ID#



In order to ensure that your payments are applied promptly to your account, please include this page with your payment.

Please make checks payable to SURS.

FOR OFFICE USE ONLY

Date	_____	Amount	_____
Check #	_____	Account Credited	_____
Account#	_____	Agency	_____
Status	_____		





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www.surs.org

October 15, 2020

Mr. Josh Hess



Member ID#:



BILLING STATEMENT FOR RECOVERY OF OVERPAID BENEFITS

Statement Balance 09/15/2020	\$12,189.78
Payments Received	.00
Interest Applied	\$61.39
Current Balance Due	\$12,251.17
Minimum Payment Due	\$603.39
Payment Due 11/01/2020	

Your account is past due. Please remit the total amount due.

Overpayment Recovery Remittance Form

Mr. Josh Hess

Member ID# [REDACTED]

In order to ensure that your payments are applied promptly to your account, please include this page with your payment.

Please make checks payable to SURS.

FOR OFFICE USE ONLY

Date	_____	Amount	_____
Check #	_____	Account Credited	_____
Account#	_____	Agency	_____
Status	_____		





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www.surs.org

September 23, 2021

Mr. Josh Hess
[REDACTED]

Member ID#: [REDACTED]

Dear Mr. Hess:

On December 4, 2019, the State Universities Retirement System (SURS) notified you of an overpayment of Disability benefits totaling \$11,769.22. The current amount due this system including any interest that has accrued is \$12,933.67. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$12,933.67 to our office by **October 25, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by October 25, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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February 13, 2020

Estate of Marion J Howard
 [REDACTED]

RE: Marion Howard, deceased
 Member ID#: [REDACTED]

Dear Estate of Marion J Howard:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Marion Howard that Marion Howard has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Marion Howard passed away on January 25, 2020; therefore, her retirement annuity was payable through January 2020.

At the time we were informed of her death, we had already sent her February 2020 retirement annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. February 2020 Sent On: 02/01/2020 Amount Sent: \$1,963.67

Total Amount Sent: \$1,963.67

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Marion Howard return the balance of \$1,963.67 to our office in the envelope provided.

If you are not the executor of the Estate of Marion Howard, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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www.surs.org

April 30, 2021

The Estate of Marion Howard

Member ID#: [REDACTED]

The Estate of Marion Howard:

On February 13, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of disability retirement benefits totaling \$1,963.67. Including payments that have been made, the current amount due this system is \$963.67. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$963.67 to our office by **May 31, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 31, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 29, 2021

Estate of Marian Johnson
 [REDACTED]

RE: Marian Johnson, deceased
 Member ID#: [REDACTED]

Dear Estate of Marian Johnson:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Marian Johnson that Marian Johnson has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Marian Johnson passed away on October 14, 2020; therefore, her survivor annuity was payable through October 2020.

At the time we were informed of her death, we had already sent her November 2020 survivor annuity payment to her checking account with Elgin State Bank through electronic transfer. The total amount of the deposit was:

1. November 2020 Sent On: 11/01/2020 Amount Sent: \$465.71

Total Amount Sent: \$465.71

We have contacted Elgin State Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Marian Johnson return the balance of \$465.71 to our office in the envelope provided.

If you are not the executor of the Estate of Marian Johnson, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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www.surs.org

January 13, 2022

Estate of Marian Johnson

Member ID#: [REDACTED]

Dear Estate of Marian Johnson:

On July 29, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$465.71. The current amount due this system is \$465.71. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$465.71 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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December 16, 2020

Estate of Camille A Jones
 [REDACTED]

RE: Camille Jones, deceased
 Member ID#: [REDACTED]

Dear Estate of Camille A Jones:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Camille Jones that Camille Jones has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Camille Jones passed away on 09/10/2020; therefore, her retirement annuity was payable through September 2020.

At the time we were informed of her death, we had already sent her October 2020 retirement annuity payment to her checking account with Bank of America through electronic transfer. The total amount of the deposit was:

1. October 2020	Sent On: 10/01/2020	Amount Sent: \$1,431.98
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Total Amount Sent: \$1,431.98

We have contacted Bank of America for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Camille Jones return the balance of \$1,431.98 to our office in the envelope provided.

If you are not the executor of the Estate of Camille Jones, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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April 30, 2021

The Estate of Camille Jones

Member ID#: [REDACTED]

The Estate of Camille Jones:

On December 16, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,431.98. Including payments that have been made, the current amount due this system is \$431.98. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$431.98 to our office by **May 31, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 31, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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July 29, 2021

Estate of Willie Jones
 [REDACTED]

RE: Willie Jones, deceased
 Member ID#: [REDACTED]

Dear Estate of Willie Jones:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Willie Jones that Willie Jones has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Willie Jones passed away on November 28, 2020; therefore, his survivor annuity was payable through November 2020.

At the time we were informed of his death, we had already sent his December 2020 survivor annuity payment to his checking account with JP Morgan Chase through electronic transfer. The total amount of the deposit was:

1. December 2020 Sent On: 12/01/2020 Amount Sent: \$2,224.03

Total Amount Sent: \$2,224.03

We have contacted JP Morgan Chase for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Willie Jones return the balance of \$2,224.03 to our office in the envelope provided.

If you are not the executor of the Estate of Willie Jones, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 13, 2022

Estate of Willie Jones

Member ID#: [REDACTED]

Dear Estate of Willie Jones:

On July 29, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$2,224.03. The current amount due this system is \$2,224.03. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,224.03 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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May 18, 2021

Estate of Mary E. King
 C/O David King
 [REDACTED]

RE: Mary E. King
 Member ID#: [REDACTED]

Dear Estate of Mary E. King:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Mary E. King that Mary E. King has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Mary E. King passed away on February 20, 2021; therefore, her retirement annuity was payable through February 2021.

At the time we were informed of her death, we had already sent her March 2021 retirement annuity payment to her checking account with Bank of America through electronic transfer. The total amount of the deposit was:

1. March 2021 Sent On: 03/01/2021 Amount Sent: \$1,495.10

Total Amount Sent: \$1,495.10

We have contacted Bank of America for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Mary E. King return the balance of \$1,495.10 to our office in the envelope provided.

If you are not the executor of the Estate of Mary E. King, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 13, 2022

Estate of Mary King
 C/O David King
 [Redacted]

Member ID#: [Redacted]

Dear Estate of Mary King:

On May 18, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,495.10. Including payments that have been made, the current amount due this system is \$495.10. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$495.10 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 4, 2021

Estate of Charas Kinkle
 [REDACTED]

RE: Charas Kinkle, deceased
 Member ID# [REDACTED]

Dear Estate of Charas Kinkle:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Charas Kinkle that Charas Kinkle has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Charas Kinkle passed away on January 31, 2021; therefore, his retirement annuity was payable through January 2021.

At the time we were informed of his death, we had already sent his February 2021 retirement annuity payment to his checking account with TCF National Bank through electronic transfer. The total amount of the deposit was:

1. February 2021 Sent On: 02/01/2021 Amount Sent: \$5,234.57

Total Amount Sent: \$5,234.57

We have contacted TCF National Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Charas Kinkle return the balance of \$5,234.57 to our office in the envelope provided.

If you are not the executor of the Estate of Charas Kinkle, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 13, 2022

Dr. Charas Kinkle
 C/o Shaylyn Marks
 [Redacted Address]

Member ID#: [Redacted]

Dear Estate of Charas Kinkle:

On May 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$5,234.57. Including payments that have been made, the current amount due this system is \$4,234.57. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$4,234.57 to our office by **February 13, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 13, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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(Page 1 of 1)

12/2/22 sas: entered60301 - STATE UNIVERSITIES RTRMNT SYST | [Change](#)Welcome Jessica Kammin | [Log Out](#)**Offset Notification Details**

Entity 60301 - STATE UNIVERSITIES RTRMNT SYST
 Total Amount Withheld \$8.50
 Offset Count 1

Offset Date 09/30/2022
 Total Claim Amount \$4,234.57



Offset Number	Debtor ID	Debtor	Payee Name	Offset Date	Order Number	Claim Amount	Amount Withheld
4772		KINKLE ESTATE OF CHARAS	KINKLE CHARAS	09/30/2022	355	\$4,234.57	\$8.50

Date 12/2/2022
 Check # AC3527319
 Amt \$8.50



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July 30, 2019

Estate of Rudolf Kurth
C/o Eva Kurth
[REDACTED]

RE: Rudolf Kurth, Deceased
Member ID# [REDACTED]

Dear Estate of Rudolf Kurth:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Rudolf Kurth that Rudolf Kurth has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Rudolf Kurth passed away on October 15, 2010; therefore, his retirement annuity was payable through October 2010.

At the time we were informed of his death, we had already sent his November 2010 through May 2011 retirement annuity payments to his checking account with First New Mexico Bank through electronic transfer. The total amount of each deposit was:

1. November 2010	Sent On: 11/01/2010	Amount Sent: \$1,237.16
2. December 2010	Sent On: 12/01/2010	Amount Sent: \$1,237.16
3. January 2011	Sent On: 01/01/2011	Amount Sent: \$1,278.82
4. February 2011	Sent On: 02/01/2011	Amount Sent: \$1,278.82
5. March 2011	Sent On: 03/01/2011	Amount Sent: \$1,278.82
6. April 2011	Sent On: 04/01/2011	Amount Sent: \$1,278.82
7. May 2011	Sent On: 05/01/2011	Amount Sent: \$1,278.82

Total Amount Sent: \$8,868.42

We have contacted First New Mexico Bank for the return of these deposits but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Rudolf Kurth return the balance of \$8,868.42 to our office in the envelope provided.

If you are not the executor of the Estate of Rudolf Kurth, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

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(Page 2 of 2)

Estate of Rudolf Kurth
July 30, 2019
Page 2

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,



Kellen C. Brown
Member Service Representative



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January 20, 2022

Estate of Rudolf Kurth
 C/O Eva Kurth
 [REDACTED]

Member ID#: [REDACTED]

Dear Estate of Rudolf Kurth:

On July 30, 2019, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$8,868.42. Including payments that have been made, the current amount due this system is \$7,868.42. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$7,868.42 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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October 8, 2020

Estate of Marla Lane
 c/o Gerald Brown III

RE: Marla Lane, deceased
 Member ID# [REDACTED]

Dear Estate of Marla Lane:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Marla Lane that Marla Lane has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Marla Lane passed away on June 13, 2020; therefore, her retirement annuity was payable through June 2020.

At the time we were informed of her death, we had already sent her July 2020 retirement annuity payment to her checking account with Credit Union One through electronic transfer. The total amount of the deposit was:

1. July 2020	Sent On: 07/01/2020	Amount Sent: \$2,662.74
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Total Amount Sent: \$2,662.74

We have contacted Credit Union One for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Marla Lane return the balance of \$2,662.74 to our office in the envelope provided.

If you are not the executor of the Estate of Marla Lane, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 30, 2021

The Estate of Marla Lane
 C/o Gerald Brown III

Member ID# [REDACTED]

The Estate of Marla Lane:

On October 8, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$2,662.74. The current amount due this system is \$1,662.74. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,662.74 to our office by **May 31, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 31, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 24, 2021

Estate of Lena Lee
 C/o Antoine Lee

RE: Lena Lee, deceased
 Member ID# [REDACTED]

Dear Estate of Lena Lee:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Lena Lee that Lena Lee has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Lena Lee passed away on May 27, 2021; therefore, her retirement annuity was payable through May 2021.

At the time we were informed of her death, we had already sent her June 2021 retirement annuity payment to her checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. June 2021 Sent On: 06/01/2021 Amount Sent: \$3,109.70

Total Amount Sent: \$3,109.70

We have contacted US Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Lena Lee return the balance of \$3,109.70 to our office in the envelope provided.

If you are not the executor of the Estate of Lena Lee, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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January 20, 2022

Estate of Lena Lee
 C/O Antoine Lee

Member ID# [REDACTED]

Dear Estate of Lena Lee:

On August 24, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$3,109.70. Including payments that have been made, the current amount due this system is \$2,109.70. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,109.70 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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February 14, 2019

Estate of June Lerman
 [REDACTED]

RE: June Lerman, deceased
 Member ID# [REDACTED]

Dear Estate of June Lerman:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of June Lerman that June Lerman has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that June Lerman passed away on February 20, 2020; therefore, her survivor annuity was payable through February 2020.

At the time we were informed of her death, we had already sent her March 2020 survivor annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. March 2020	Sent On: 3/01/2020	Amount Sent: \$638.88
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Total Amount Sent: \$638.88

We have contacted JPMorgan Chase Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of June Lerman return the balance of \$638.88 to our office in the envelope provided.

If you are not the executor of the Estate of June Lerman, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 30, 2021

The Estate of June Lerman

Member ID# [REDACTED]

The Estate of June Lerman:

On February 14, 2019, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$638.88. The current amount due this system is \$638.88. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$638.88 to our office by **May 31, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 31, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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November 10, 2020

Estate of Myra Linden
 [REDACTED]

RE: Myra Linden, deceased
 Member ID [REDACTED]

Dear Estate of Myra Linden:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Myra Linden that Myra Linden has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Myra Linden passed away on 08/31/2020; therefore, her retirement annuity was payable through August 2020.

At the time we were informed of her death, we had already sent her September 2020 retirement annuity payment to her checking account with Commerce Bank through electronic transfer. The total amount of the deposit was:

1. September 2020 Sent On: 09/01/2020 Amount Sent: \$3,483.42

Total Amount Sent: \$3,483.42

We have contacted Commerce Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Myra Linden return the balance of \$3,483.42 to our office in the envelope provided.

If you are not the executor of the Estate of Myra Linden, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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April 23, 2021

The Estate of Myra Linden

Member ID# [REDACTED]

The Estate of Myra Linden:

On November 10, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$3,483.42. Including the payments that have been made, the current amount due this system is \$2,483.42. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,483.42 to our office by **May 24, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by May 24, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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August 4, 2021

Estate of Reuben Logan
 C/O Sandra Priest
 [REDACTED]

RE: Reuben Logan, deceased
 Member ID#: [REDACTED]

Dear Estate of Reuben Logan:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Reuben Logan that Reuben Logan has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Reuben Logan passed away on February 24, 2021; therefore, his survivor annuity was payable through February 2021.

At the time we were informed of his death, we had already sent his March 2021 survivor annuity payment to his checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. March 2021	Sent On: 03/01/2021	Amount Sent: \$2,222.43
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Total Amount Sent: \$2,222.43

We have contacted US Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Reuben Logan return the balance of \$2,222.43 to our office in the envelope provided.

If you are not the executor of the Estate of Reuben Logan, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 20, 2022

Estate of Rueben Logan
 C/O Sandra Priest

Member ID# [REDACTED]

Dear Estate of Reuben Logan:

On August 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$2,222.43. The current amount due this system is \$2,222.43. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,222.43 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 7, 2020

Estate of Fred W McMillan
 C/o William McMillan
 [REDACTED]

RE: Fred McMillan, deceased
 Member ID# [REDACTED]

Dear Estate of Fred W McMillan:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Fred McMillan that Fred McMillan has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Fred McMillan passed away on July 29, 2020; therefore, his retirement annuity was payable through March 2020.

At the time we were informed of his death, we had already sent his August 2020 retirement annuity payment to his checking account with H & R Block Bank through electronic transfer. The total amount of the deposit was:

1. August 2020 Sent On: 08/01/2020 Amount Sent: \$2,538.75

Total Amount Sent: \$2,538.75

We have contacted H & R Block Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Fred McMillan return the balance of \$2,538.75 to our office in the envelope provided.

If you are not the executor of the Estate of Fred McMillan, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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February 1, 2021

The Estate of Fred McMillan, Jr.

██████████
 JERIC, IL 60451-1020

Member ID# ██████████

To the Estate of Fred McMillan:

On August 7, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,538.75. The current amount due this system is \$2,538.75. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,538.75 to our office by **March 3, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by March 3, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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March 2, 2021

Estate of Delores Moody
 [REDACTED]

RE: Delores Moody, deceased
 Member ID# [REDACTED]

Dear Estate of Delores Moody:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Delores Moody that Delores Moody has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Delores Moody passed away on November 21, 2020; therefore, her retirement annuity was payable through November 2020.

At the time we were informed of her death, we had already sent her December 2020 and January 2021 retirement annuity payments to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of each deposit was:

1. December 2020	Sent On: 12/01/2020	Amount Sent: \$703.79
2. January 2021	Sent On: 01/01/2021	Amount Sent: \$723.37

Total Amount Sent: \$1,427.16

We have contacted JPMorgan Chase Bank for the return of these deposits but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Delores Moody return the balance of \$1,427.16 to our office in the envelope provided.

If you are not the executor of the Estate of Delores Moody, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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April 20, 2022

Estate of Delores Moody

Member ID# [REDACTED]

Dear Estate of Delores Moody:

On March 2, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,427.16. Including payments that have been made, the current amount due this system is \$427.16. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$427.16 to our office by **May 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by May 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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January 22, 2019

Estate of James Moore
 [REDACTED]

RE: James Moore, deceased
 Member ID#: [REDACTED]

To Whom It May Concern:

This letter is to inform you of an overpayment of the above named Retirement Annuity Benefit in the amount of \$17,736.84 has yet to be recovered for the November and December 2018 Retirement Annuity.

The State Universities Retirement System has sent these payments to the JP Morgan Chase Bank through electronic transfer. Due to Mr. Moore's death, this benefit was only payable through the month of October 2018.

We have contacted the JP Morgan Chase Bank for the return of these funds; however, we have been informed that the account was unable to be recalled due to no response.


Before we can finalize the account, we need to have these funds returned. Please remit \$17,736.84 to the State Universities Retirement System in the enclosed envelope.

STAFF DETERMINATION

You may file a written Request for Review by the Senior Claims Manager of Member Services at SURS, at the address shown above, if you believe this decision is incorrect. Your Request for Review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have additional questions, please contact SURS at the above listed telephone numbers.

Sincerely yours,


 Lisa Mitchell
 Member Service Representative

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

(Page 2 of 2)

Mr. James Moore
January 22, 2019
Page 2



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February 1, 2021

The Estate of James Moore

Member ID# [REDACTED]

To Whom It May Concern:

On July 6, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$31,834.65. Including payments that have been made, the current amount due this system is \$16,736.84. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$6,808.02 to our office by **March 3, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by March 3, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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 www.surs.org

July 29, 2021

Estate of Kenneth Moore
 C/O Debra Fuget
 [REDACTED]

RE: Kenneth Moore, deceased
 Member ID# [REDACTED]

Dear Estate of Kenneth Moore:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Kenneth Moore that Kenneth Moore has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Kenneth Moore passed away on 07/17/2020; therefore, his survivor annuity was payable through July 2020.

At the time we were informed of his death, we had already sent his August 2020 survivor annuity payment to his checking account with First State Bank through electronic transfer. The total amount of the deposit was:

1. August 2020	Sent On: 08/01/2020	Amount Sent: \$721.19
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Total Amount Sent: \$721.19

We have contacted First State Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Kenneth Moore return the balance of \$721.19 to our office in the envelope provided.

If you are not the executor of the Estate of Kenneth Moore, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,

Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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January 20, 2022

Estate of Kenneth Moore
 C/o Debra Fuget

Member ID#: [REDACTED]

Dear Estate of Kenneth Moore:

On July 29, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$721.19. The current amount due this system is \$721.19. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$721.19 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 18, 2020

Estate of Thomas Nedved
 c/o Lisa Weintraub
 [REDACTED]

RE: Thomas Nedved, deceased
 Member ID#: [REDACTED]

Dear Estate of Thomas Nedved:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Thomas Nedved that Thomas Nedved has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Thomas Nedved passed away on 12/31/2019; therefore, his survivor annuity was payable through December 2019.

At the time we were informed of his death, we had already sent his January 2020 survivor annuity payment to his checking account with US Bank through electronic transfer. The total amount of the deposit was:

1. January 2020	Sent On: 01/01/2020	Amount Sent: \$531.34
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Total Amount Sent: \$531.34

We have contacted US Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Thomas Nedved return the balance of \$531.34 to our office in the envelope provided.

If you are not the executor of the Estate of Thomas Nedved, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

Member Service Division

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February 1, 2021

The Estate of Thomas Nedved

Member ID# [REDACTED]

The Estate of Thomas Nedved:

On May 18, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$531.34. The current amount due this system is \$531.34. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$531.34 to our office by **March 3, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by March 3, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 4, 2021

Estate of Nancy Owens
 [REDACTED]

RE: Nancy Owens, deceased
 Member ID [REDACTED]

Dear Estate of Nancy Owens:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Nancy Owens that Nancy Owens has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Nancy Owens passed away on January 6, 2021; therefore, her survivor annuity was payable through January 2021.

At the time we were informed of her death, we had already sent her February 2021 survivor annuity payment to her checking account with Bank of America through electronic transfer. The total amount of the deposit was:

1. February 2021	Sent On: 02/01/2021	Amount Sent: \$3,248.24
		Total Amount Sent: \$3,248.24

We have contacted Bank of America for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Nancy Owens return the balance of \$3,248.24 to our office in the envelope provided.

If you are not the executor of the Estate of Nancy Owens, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 20, 2022

Estate of Nancy Owens

Member ID#: [REDACTED]

Dear Estate of Nancy Owens:

On August 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$3,248.24. The current amount due this system is \$3,248.24. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$3,248.24 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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July 7, 2021

Estate of Patricia A Panalle
 [REDACTED]

RE: Patricia A Panalle, deceased
 Member ID# [REDACTED]

Dear Estate of Patricia A Panalle:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Patricia A Panalle that Patricia A Panalle has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Patricia A Panalle passed away on March 16, 2021; therefore, her retirement annuity was payable through March 2021.

At the time we were informed of her death, we had already sent her April 2021 retirement annuity payments to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. April 2021 Sent On: 04/01/2021 Amount Sent: \$1,829.11

Total Amount Sent: \$1,829.11

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Patricia A Panalle return the balance of \$1,829.11 to our office in the envelope provided.

If you are not the executor of the Estate of Patricia A Panalle, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 20, 2022

Estate of Patricia Panalle

Member ID# [REDACTED]

Dear Estate of Patricia Panalle:

On July 7, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of disability retirement benefits totaling \$1,829.11. Including payments that have been made, the current amount due this system is \$829.11. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$829.11 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 4, 2021

Estate of Pat Pappas
 C/O John Pappas

RE: Pat Pappas, deceased
 Member ID# [REDACTED]

Dear Estate of Pat Pappas:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Pat Pappas that Pat Pappas has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Pat Pappas passed away on January 21, 2021; therefore, her survivor annuity was payable through January 2021.

At the time we were informed of her death, we had already sent her February 2021 survivor annuity payment. The total amount of the check was:

1. February 2021	Sent On: 02/01/2021	Amount Sent: \$541.90
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Total Amount Sent: \$541.90

We have been informed that this check has been cashed. Therefore, at this time, we are requesting that the executor of the Estate of Pat Pappas return the balance of \$541.90 to our office in the envelope provided.

If you are not the executor of the Estate of Pat Pappas, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 20, 2022

Estate of Pat Pappas
 C/o John Pappas

Member ID# [REDACTED]

Dear Estate of Pat Pappas:

On August 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$541.90. The current amount due this system is \$541.90. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$541.90 to our office by **February 20, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 20, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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October 26, 2020

Estate of Aaron Parker Sr.
 [REDACTED]

RE: Aaron Parker Sr., deceased
 Member ID#: [REDACTED]

Dear Estate of Aaron Parker Sr.:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Aaron Parker Sr. that Aaron Parker Sr. has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Aaron Parker Sr. passed away on 9/25/2020; therefore, his retirement annuity was payable through September 2020.

At the time we were informed of his death, we had already sent his September 2020 retirement annuity payment. The total amount of the check was:

1. October 2020 Sent On: 10/01/2020 Amount Sent: \$1,579.96

Total Amount Sent: \$1,579.96

At this time, we are requesting that the executor of the Estate of Aaron Parker Sr. return the balance of \$1,579.96 to our office in the envelope provided.

If you are not the executor of the Estate of Aaron Parker Sr., please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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February 1, 2021

The Estate of Aaron Parker, Sr.
[REDACTED]

Member ID# [REDACTED]

The Estate of Aaron Parker, Sr.:

On October 26, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,579.96. The current amount due this system is \$1,579.96. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,579.96 to our office by **March 3, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by March 3, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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February 21, 2020

Estate of Yvonne M Pierce
 [REDACTED]

RE: Yvonne M Pierce, deceased
 Member ID# [REDACTED]

Dear Estate of Yvonne M Pierce:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Yvonne Pierce that Yvonne Pierce has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Yvonne Pierce passed away on December 24, 2019; therefore, her retirement annuity was payable through December 2019.

At the time we were informed of her death, we had already sent her January 2020 retirement annuity payment to her checking account with Bank of America through electronic transfer. The total amount of the deposit was:

1. January 2020	Sent On: 01/01/2020	Amount Sent: \$6,081.28
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Total Amount Sent: \$6,081.28

We have contacted Bank of America for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Yvonne Pierce return the balance of \$6,081.28 to our office in the envelope provided.

If you are not the executor of the Estate of Yvonne Pierce, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, the information contained herein states SURS' current understanding of the law which could change over time due to court opinions, statutory changes, or other legal matters or interpretations (e.g., attorney general opinions). SURS is required under law to correct any mistake in benefit amount, even after payments have begun. This document was created for general information only. Any information provided by SURS does not represent personal tax or legal advice, either express or implied. You are encouraged to seek professional legal and/or tax advice for your personal income tax questions and for all other legal purposes.



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 www.surs.org

May 19, 2020

Estate of Yvonne M Pierce
 C/o Rev. Dorothy L. Lucas

1

RE: Yvonne Pierce, deceased
 Member ID# [REDACTED]

Dear Estate of Yvonne M Pierce:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Yvonne Pierce that Yvonne Pierce has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Yvonne Pierce passed away on December 24, 2019; therefore, her retirement annuity was payable through December 2019.

At the time we were informed of her death, we had already sent her January 2020 retirement annuity payment to her checking account with Bank of America through electronic transfer. The total amount of the deposit was:

1. January 2020	Sent On: 01/01/2020	Amount Sent: \$6,081.28
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Total Amount Sent: \$6,081.28

We have contacted Bank of America for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Yvonne Pierce return the balance of \$6,081.28 to our office in the envelope provided.

If you are not the executor of the Estate of Yvonne Pierce, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Sincerely yours,

Member Service Division

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www.surs.org

February 5, 2021

The Estate of Yvonne Pierce

Member ID# [REDACTED]

The Estate of Yvonne Pierce:

On February 21, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$6,081.28. The current amount due this system is \$6,081.28. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$6,081.28 to our office by **March 7, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by March 7, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 16, 2021

Estate of Josephine L Price
 [REDACTED]

RE: Josephine L Price, deceased
 Member ID#: [REDACTED]

Dear Estate of Josephine L Price:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Josephine L Price that Josephine L Price has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Josephine L Price passed away on June 20, 2021; therefore, her retirement annuity was payable through June 2021.

At the time we were informed of her death, we had already sent her July 2021 retirement annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. July 2021 Sent On: 07/01/2021 Amount Sent: \$2,709.96

Total Amount Sent: \$2,709.96

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Josephine L Price return the balance of \$2,709.96 to our office in the envelope provided.

If you are not the executor of the Estate of Josephine L Price, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 24, 2022

Estate of Josephine Price
 [REDACTED]

Member ID# [REDACTED]

Dear Estate of Josephine Price:

On July 16, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,709.96. Including payments that have been made, the current amount due this system is \$1,709.96. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,709.96 to our office by **February 24, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 24, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 8, 2021

Estate of Charlotte Pritchard
 [REDACTED]

RE: Charlotte Pritchard, deceased
 Member ID#: [REDACTED]

Dear Estate of Charlotte Pritchard:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Charlotte Pritchard that Charlotte Pritchard has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Charlotte Pritchard passed away on June 8, 2020; therefore, her survivor annuity was payable through June 2020.

At the time we were informed of her death, we had already sent her July 2020 survivor annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. July 2020 Sent On: 07/01/2020 Amount Sent: \$1,710.86

Total Amount Sent: \$1,710.86

We have contacted JPMorgan Chase Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Charlotte Pritchard return the balance of \$1,710.86 to our office in the envelope provided.

If you are not the executor of the Estate of Charlotte Pritchard, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 24, 2022

Estate of Charlotte Pritchard

Member ID: [REDACTED]

Dear Estate of Charlotte Pritchard:

On July 8, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,710.86. The current amount due this system is \$1,710.86. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,710.86 to our office by **February 24, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 24, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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July 30, 2021

Estate of Lois Randolph
 [REDACTED]

RE: Lois Randolph, deceased
 Member ID#: [REDACTED]

Dear Estate of Lois Randolph:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Lois Randolph that Lois Randolph has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Lois Randolph passed away on December 17, 2020; therefore, her survivor annuity was payable through December 2020.

At the time we were informed of her death, we had already sent her January 2021 survivor annuity payment to her checking account with Busey Bank through electronic transfer. The total amount of the deposit was:

1.	January 2021	Sent On: 01/01/2021	Amount Sent: \$1,211.76
			Total Amount Sent: \$1,211.76

We have contacted Busey Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Lois Randolph return the balance of \$1,211.76 to our office in the envelope provided.

If you are not the executor of the Estate of Lois Randolph, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be received by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 24, 2022

Estate of Lois Randolph

Member ID# [REDACTED]

Dear Estate of Lois Randolph:

On July 30, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,211.76. The current amount due this system is \$1,211.76. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,211.76 to our office by **February 24, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 24, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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May 26, 2021

Estate of Linda Sue Rivera
 C/O Lisa Rivera

RE: Linda Sue Rivera, deceased
 Member ID#: [REDACTED]

Dear Estate of Linda Sue Rivera:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Linda Sue Rivera that Linda Sue Rivera has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Linda Sue Rivera passed away on April 3, 2021; therefore, her retirement annuity was payable through April 2021.

At the time we were informed of her death, we had already sent her May 2021 retirement annuity payment to her checking account with BMO Harris Bank through electronic transfer. The total amount of the deposit was:

1. May 2021	Sent On: 05/01/2021	Amount Sent: \$2,956.13
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Total Amount Sent: \$2,956.13

We have contacted BMO Harris Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Linda Sue Rivera return the balance of \$2,956.13 to our office in the envelope provided.

If you are not the executor of the Estate of Linda Sue Rivera, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 24, 2022

Estate of Linda Rivera
 C/O Lisa Rivera

Member ID# [REDACTED]

Dear Estate of Linda Rivera:

On May 26, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,956.13. Including payments that have been made, the current amount due this system is \$1,956.13. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,956.13 to our office by **February 24, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 24, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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November 10, 2020

Estate of Emma L. Shelton

RE: Emma Shelton, deceased
 Member ID# [REDACTED]

Dear Estate of Emma L. Shelton:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Emma Shelton that Emma Shelton has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Emma Shelton passed away on 09/09/2020; therefore, her retirement annuity was payable through September 2020.

At the time we were informed of her death, we had already sent her October 2020 retirement annuity payment to her savings account with Regions Bank through electronic transfer. The total amount of the deposit was:

1. October 2020	Sent On: 10/01/2020	Amount Sent: \$2,400.24
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Total Amount Sent: \$2,400.24

We have contacted Regions Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Emma Shelton return the balance of \$2,400.24 to our office in the envelope provided.

If you are not the executor of the Estate of Emma Shelton, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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May 24, 2021

The Estate of Emma Shelton

New Orleans, LA 70129-1517

Member ID# [REDACTED]

The Estate of Emma Shelton:

On November 10, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,400.24. Including payments that have been made, the current amount due this system is \$1,400.24. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,400.24 to our office by **June 23, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by June 23, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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August 4, 2021

Estate of Kenneth Smith
 [REDACTED]

RE: Kenneth Smith, deceased
 Member ID#: [REDACTED]

Dear Estate of Kenneth Smith:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Kenneth Smith that Kenneth Smith has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Kenneth Smith passed away on March 31, 2021; therefore, his survivor annuity was payable through March 2021.

At the time we were informed of his death, we had already sent his April and May 2021 survivor annuity payments to his checking account with Longview State Bank through electronic transfer. The total amount of each deposit was:

1. April 2021	Sent On: 04/01/2021	Amount Sent: \$1,235.33
2. May 2021	Sent On: 05/01/2021	Amount Sent: \$1,235.33

Total Amount Sent: \$2,470.66

We have contacted Longview State Bank for the return of these deposits but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Kenneth Smith return the balance of \$2,470.66 to our office in the envelope provided.

If you are not the executor of the Estate of Kenneth Smith, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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1901 Fox Drive, Champaign, IL 61820 7333
800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
www.surs.org

January 24, 2022

Estate of Kenneth Smith

Member ID#: [REDACTED]

Dear Estate of Kenneth Smith:

On August 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,470.66. The current amount due this system is \$2,470.66. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,470.66 to our office by **February 24, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 24, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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 www.surs.org

August 4, 2021

Estate of Willie Smith
 [REDACTED]

RE: Willie Smith
 Member ID# [REDACTED]

Dear Estate of Willie Smith:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Willie Smith that Willie Smith has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Willie Smith passed away on April 16, 2021; therefore, his survivor annuity was payable through April 2021.

At the time we were informed of his death, we had already sent his May 2021 survivor annuity payment to his checking account with TCF Bank through electronic transfer. The total amount of the deposit was:

1. May 2021 Sent On: 05/01/2021 Amount Sent: \$1,607.83

Total Amount Sent: \$1,607.83

We have contacted TCF Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Willie Smith return the balance of \$1,607.83 to our office in the envelope provided.

If you are not the executor of the Estate of Willie Smith, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely,
 Member Service Division

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January 25, 2022

Estate of Willie Smith

Member ID# [REDACTED]

Dear Estate of Willie Smith:

On August 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$1,607.83. The current amount due this system is \$1,607.83. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,607.83 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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February 4, 2021

Estate of V Lee Stevens
 C/o Linda Stevens
 [REDACTED]

RE: V Lee Stevens, deceased
 Member ID# [REDACTED]

Dear Stevens:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of V Lee Stevens that V Lee Stevens has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that V Lee Stevens passed away on 10/30/2020; therefore, his retirement annuity was payable through October 2020.

At the time we were informed of his death, we had already sent his November 2020 retirement annuity payment to his checking account with Frost Bank through electronic transfer. The total amount of the deposit was:

1. November 2020 Sent On: 11/01/2020 Amount Sent: \$3,160.16

Total Amount Sent: \$3,160.16

We have contacted Frost Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of V Lee Stevens return the balance of \$3,160.16 to our office in the envelope provided.

If you are not the executor of the Estate of V Lee Stevens, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 25, 2022

Estate of V Lee Stevens
 C/O Linda Stevens
 [REDACTED]

Member ID [REDACTED]

Dear Estate of V Lee Stevens:

On February 4, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$3,160.16. Including payments that have been made, the current amount due this system is \$2,160.16. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,160.16 to our office by **February 24, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 24, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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June 18, 2021

Estate of Dale Vogeler
 [REDACTED]

RE: Dale Vogeler, deceased
 Member ID# [REDACTED]

Dear Estate of Dale Vogeler:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Dale Vogeler that Dale Vogeler has been overpaid for the survivor annuity he was receiving from SURS at the time of his death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Dale Vogeler passed away on September 27, 2020; therefore, his survivor annuity was payable through September 2020.

At the time we were informed of his death, we had already sent his October 2020 survivor annuity payment to his checking account with First State Bank through electronic transfer. The total amount of the deposit was:

1. October 2020 Sent On: 10/01/2020 Amount Sent: \$204.41

Total Amount Sent: \$204.41

We have contacted First State Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Dale Vogeler return the balance of \$204.41 to our office in the envelope provided.

If you are not the executor of the Estate of Dale Vogeler, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

Member Service Division

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January 25, 2022

Estate of Dale Vogeler

Member ID# [REDACTED]

Dear Estate of Dale Vogeler:

On June 18, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$204.41. The current amount due this system is \$204.41. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$204.41 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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December 9, 2020

Estate of Mary Wallace
 C/o Tracy Shaw
 [REDACTED]

RE: Mary Wallace, deceased
 Member ID# [REDACTED]

Dear Estate of Mary Wallace:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Mary Wallace that Mary Wallace has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Mary Wallace passed away on December 30, 2019; therefore, her retirement annuity was payable through December 2019.

At the time we were informed of her death, we had already sent her January 2020 retirement annuity payment to her checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. January 2019 Sent On: 01/01/2020 Amount Sent: \$3,016.70

Total Amount Sent: \$3,016.70

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Mary Wallace return the balance of \$3,016.70 to our office in the envelope provided.

If you are not the executor of the Estate of Mary Wallace, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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May 24, 2021

The Estate of Mary Wallace
 C/o Tracy Shaw

Member ID# [REDACTED]

The Estate of Mary Wallace:

On December 9, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$3,016.70. Including payments that have been made, the current amount due this system is \$2,016.70. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,016.70 to our office by **June 23, 2021** or contact our office to set up a formal payment plan. If we do not hear from you by June 23, 2021, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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April 30, 2021

Estate of Judith H Washburn
 [REDACTED]

RE: Judith Washburn, deceased
 Member ID [REDACTED]

Dear Estate of Judith H Washburn:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Judith Washburn that Judith Washburn has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Judith Washburn passed away on 03/22/2021; therefore, her retirement annuity was payable through March 2021.

At the time we were informed of her death, we had already sent her April 2021 retirement annuity payment to her savings account with Bank of America through electronic transfer. The total amount of the deposit was:

1. April 2021 Sent On: 04/01/2021 Amount Sent: \$1,339.32

Total Amount Sent: \$1,339.32

We have contacted Bank of America for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Judith Washburn return the balance of \$1,339.32 to our office in the envelope provided.

If you are not the executor of the Estate of Judith Washburn, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 25, 2022

Estate of Judith Washburn

Member ID [REDACTED]

Dear Estate of Judith Washburn:

On April 30, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,339.32. Including payments that have been made, the current amount due this system is \$339.32. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$339.32 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
Senior Claims Manager

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 www.surs.org

November 17, 2020

Estate of Ruth I Waterman
 C/o Bonnie Hall
 [Redacted]

RE: Ruth Waterman, deceased
 Member ID: [Redacted]

Dear Estate of Ruth I Waterman:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Ruth Waterman that Ruth Waterman has been overpaid for the retirement annuity she was receiving from SURS at the time of her death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Ruth Waterman passed away on 10/20/2020; therefore, her retirement annuity was payable through October 2020.

At the time we were informed of her death, we had already sent her November 2020 retirement annuity payment to her checking account with Wells Fargo through electronic transfer. The total amount of the deposit was:

1. November 2020 Sent On: 11/01/2020 Amount Sent: \$2,059.45

Total Amount Sent: \$2,059.45

We have contacted Wells Fargo for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Ruth Waterman return the balance of \$2,059.45 to our office in the envelope provided.

If you are not the executor of the Estate of Ruth Waterman, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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January 25, 2022

Estate of Ruth Waterman
 C/O Bonnie Hall
 [Redacted Address]

Member ID#: [Redacted]

Dear Estate of Ruth Waterman:

On November 17, 2020, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$2,059.45. Including payments that have been made, the current amount due this system is \$1,059.45. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,059.45 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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www.surs.org

October 3, 2018

The Estate of Marjorie Weissman

RE: Marjorie Weissman, deceased
 Member ID#: [REDACTED]

Dear Estate of Marjorie Weissman:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Marjorie Weissman that Marjorie Weissman has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the survivor passes away. We were informed that Marjorie Weissman passed away on February 10, 2018; therefore, her survivor annuity was payable through February 2018.

At the time we were informed of her death, we had already sent checks for payment of her March 2018 through May 2018 survivor annuity and they have been cashed. The total amounts of the checks were:

1. March 2018	Sent On: 03/01/2018	Amount Sent: \$2,183.55
2. April 2018	Sent On: 04/01/2018	Amount Sent: \$2,183.55
3. May 2018	Sent On: 05/01/2018	Amount Sent: \$2,183.55

Total Amount Sent: \$6,550.65

At this time, we are requesting that the executor of the Estate of Marjorie Weissman return the balance of \$6,550.65 to our office in the envelope provided.

If you are not the executor of the Estate of Marjorie Weissman, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a Benefits Counselor at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,

All aspects of administration of the State Universities Retirement System (SURS), including but not limited to benefit calculation and payment, must comply with state and federal law. No employee of SURS has the authority to bind the System to take action contrary to law, even in the event of misstatement of fact or law. Furthermore, while this letter states SURS's current understanding of the law, this could change as a result of court opinions, statutory changes, or other matters (e.g., Attorney General opinions). Accordingly, SURS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this letter, form, or any other document provided by SURS is for general information only and does not represent personal tax or legal advice either express or implied. You must seek professional legal or tax advice for personal income tax questions and other legal assistance.

The Estate of Marjorie Weissman
October 3, 2018
Page 2

Joe Butters

Sara Gutknecht

Member Service Representative



1901 Fox Drive, Champaign, IL 61820-7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

August 11, 2022

The Estate of Marjorie Weissman

RE: Marjorie Weissman, deceased
 Member ID# [REDACTED]

The Estate of Ms. Weissman:

On October 3, 2018, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$6,550.65. Including payments that have been made, the current amount due this system is \$6,550.65. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$6,550.65 to our office by **September 12, 2022**, or contact our office to set up a formal payment plan. If we do not hear from you by September 12, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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 www.surs.org

May 13, 2021

Estate of Daniel White
 C/O Linda White

RE: Daniel White, deceased
 Member ID# [REDACTED]

Dear Estate of Daniel White:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Daniel White that Daniel White has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Daniel White passed away on January 26, 2021; therefore, his retirement annuity was payable through January 2021.

At the time we were informed of his death, we had already sent his February 2021 retirement annuity payment to his checking account with Citibank through electronic transfer. The total amount of the deposit was:

1. February 2021	Sent On: 02/01/2021	Amount Sent: \$3,168.92
		Total Amount Sent: \$3,168.92

We have contacted Citibank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Daniel White return the balance of \$3,168.92 to our office in the envelope provided.

If you are not the executor of the Estate of Daniel White, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

You may file a written request for review by the Senior Claims Manager at SURS, at the address shown above, if you believe this decision is incorrect. Your request for review must be **received** by SURS within 35 days from the date of this decision. If you fail to file a request within 35 days, this decision will become final.

If you have any questions, please contact a SURS Member Service Representative at 1-800-275-7877 or 217-378-8800 in the Champaign-Urbana area.

Sincerely yours,
 Member Service Division

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 www.surs.org

January 25, 2022

Estate of Daniel White
 C/O Linda White

Member ID# [REDACTED]

Dear Mr. White:

On May 13, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$3,168.92. Including payments that have been made, the current amount due this system is \$2,168.92. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$2,168.92 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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 www.surs.org

July 16, 2021

Estate of Frederick Williams
 [REDACTED]

RE: Frederick Williams, deceased
 Member ID#: [REDACTED]

Dear Estate of Frederick Williams:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Frederick Williams that Frederick Williams has been overpaid for the retirement annuity he was receiving from SURS at the time of his death. SURS pays retirement annuities through the month in which the member passes away. We were informed that Frederick Williams passed away on June 17, 2021; therefore, his retirement annuity was payable through June 2021.

At the time we were informed of his death, we had already sent his July 2021 retirement annuity payment to his checking account with JPMorgan Chase Bank through electronic transfer. The total amount of the deposit was:

1. July 2021	Sent On: 07/1/2021	Amount Sent: \$1,717.70
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Total Amount Sent: \$1,717.70

We have contacted JPMorgan Chase Bank for the return of this deposit, but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Frederick Williams return the balance of \$1,717.70 to our office in the envelope provided.

If you are not the executor of the Estate of Frederick Williams, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

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Sincerely yours,
 Member Service Division

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January 25, 2022

Estate of Frederick Williams

Member ID# [REDACTED]

Dear Estate of Frederick Williams:

On July 16, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of retirement benefits totaling \$1,717.70. The the current amount due this system is \$1,717.70. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$1,717.70 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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June 18, 2021

Estate of Barbara Wilson
 C/O John Wilson
 [REDACTED]

RE: Barbara Wilson, deceased
 Member ID#: [REDACTED]

Dear Estate of Barbara Wilson:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Barbara Wilson that Barbara Wilson has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Barbara Wilson passed away on November 26, 2020; therefore, her survivor annuity was payable through November 2020.

At the time we were informed of her death, we had already sent her December 2020 survivor annuity payment to her checking account with Regions Bank through electronic transfer. The total amount of the deposit was:

1. December 2020 Sent On: 12/01/2020 Amount Sent: \$508.13

Total Amount Sent: \$508.13

We have contacted Regions Bank for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Barbara Wilson return the balance of \$508.13 to our office in the envelope provided.

If you are not the executor of the Estate of Barbara Wilson, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

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(Page 2 of 2)

Estate of FBarbara Wilson

June 18, 2021

Page 2

Sincerely yours,

Member Service Division



1901 Fox Drive, Champaign, IL 61820-7333
 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
www.surs.org

January 25, 2022

Estate of Barbara Wilson
 C/o John Wilson
 [Redacted]

Member ID# [Redacted]

Dear Estate of Barbara Wilson:

On June 18, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$508.13. The current amount due this system is \$508.13. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$508.13 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

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Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
 www.surs.org

June 18, 2021

Estate of Faye Wright
 [REDACTED]

RE: Faye Wright, deceased
 Member ID [REDACTED]

Dear Estate of Faye Wright:

The State Universities Retirement System (SURS) is sending this letter to inform the executor of the Estate of Faye Wright that Faye Wright has been overpaid for the survivor annuity she was receiving from SURS at the time of her death. SURS pays survivor annuities through the month in which the member passes away. We were informed that Faye Wright passed away on January 18, 2021; therefore, her survivor annuity was payable through January 2021.

At the time we were informed of her death, we had already sent her February 2021 survivor annuity payment to her checking account with Standard Bank & Trust through electronic transfer. The total amount of the deposit was:

1. February 2021 Sent On: 02/01/2021 Amount Sent: \$3,210.45

Total Amount Sent: \$3,210.45

We have contacted Standard Bank & Trust for the return of this deposit but they are unable to return the funds to us.

At this time, we are requesting that the executor of the Estate of Faye Wright return the balance of \$3,210.45 to our office in the envelope provided.

If you are not the executor of the Estate of Faye Wright, please contact our office to let us know and to provide other information (such as who the executor is or whether or not the estate will go through probate).

Staff Determination

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(Page 2 of 2)

Estate of Faye Wright
June 18, 2021
Page 2

Sincerely yours,

Member Service Division



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 800-275-7877 • 217-378-8800 • (Fax) 217-378-9800
www.surs.org

January 25, 2022

Estate of Faye Wright

Member ID# [REDACTED]

Dear Estate of Faye Wright:

On June 18, 2021, the State Universities Retirement System (SURS) notified you of an overpayment of survivor benefits totaling \$3,210.45. The current amount due this system is \$3,210.45. To date, the attempt to collect this overpayment have been unsuccessful, so we will have to take additional action.

To avoid this debt being turned over to the State of Illinois Comptroller for collection, please remit payment of \$3,210.45 to our office by **February 25, 2022** or contact our office to set up a formal payment plan. If we do not hear from you by February 25, 2022, SURS will turn this debt over to the Comptroller. The Comptroller may collect from any payments you receive from the State of Illinois and may deduct up to 25% of your disposable income from each paycheck until the full debt is collected.

If you have any questions regarding this matter, please contact our office at 800-275-7877.

Sincerely yours,

Jennifer J. Bartell
 Senior Claims Manager

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LINEASOLUTIONS

SURS Project Velocity Update

Pension Administration System (PAS) Replacement

September 2023







Agenda

- Project Status
- Project Extension Proposal
 - Overview of Change Orders
 - Vendor Presentations





Project Status: Extension & Budget Approval Needed

Scope	Schedule
	
Budget	Quality
	

LEGEND

GREEN - ON TRACK

YELLOW - AT RISK

RED - RISK IS REALIZED & ACTION PLAN IS IN PLACE TO ADDRESS

Reasons for Extension

1

Avoid overlap of VAL2 Testing with sprints

2

Avoid project work over holiday periods for SURS

3

Additional sprint topics

Pension Calculations

- Resource constraints
- Decision delays

Reciprocal Ret. Estimates

- Scope underestimated (separate C.O.)
- Additional clarification requirements

Retirement Savings Plan (RSP)

- Scope clarifications
- SB1235 Changes
- Scope change

FY2024 Budget Expectations (not extension related)



**Total
Spend**

- **\$7,190,740**



**Total:
\$5,022,700**

- Expected:
\$3,960,000
- Contingency
Use: \$1,062,700



**Total:
\$1,956,000**

- Expected:
\$1,567,200
- Contingency
Use: \$388,800



**Total:
\$212,040**

- Expected:
\$196,584
- Contingency
Use: \$15,456



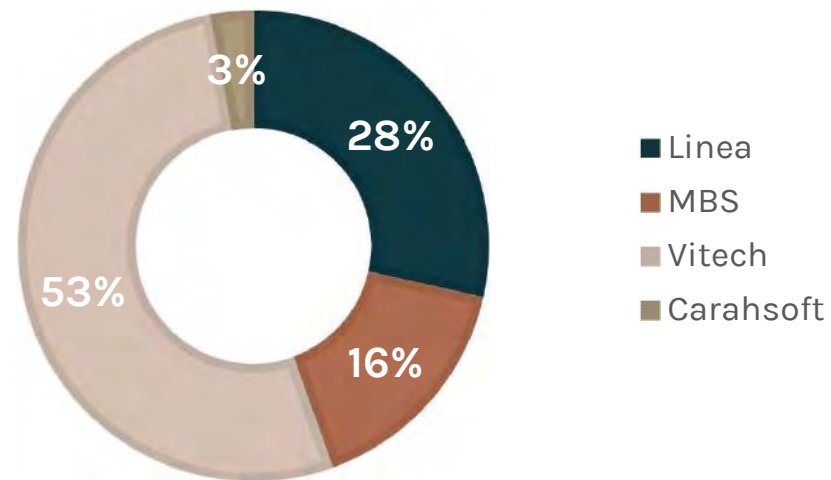
Contingency Budget – Approved & Pending Change Orders

Total Contingency: \$2,000,000

Contingency amount from FY25 and unused travel funds from FY23 were pulled to increase the contingency available for FY24.

The pending and expected change orders for FY24 will leave ~\$90K in the contingency.

CONTINGENCY USE BY VENDOR INCLUDES EXPECTED FY24 USE





Today's Focus: Project Extension Budget Proposals

- Each vendor will present on their change order for the project extension and will be available to answer questions.

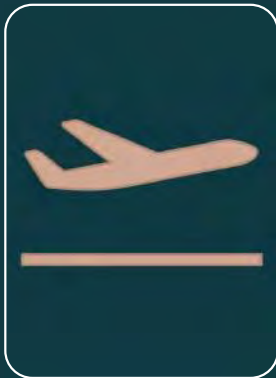
Total Budget Ask for Project Extension (all fiscal years)



**\$ 6.9 M Total
MBS, Linea,
& Vitech**



FY24 Project Extension Costs



Vitech: \$ 770,000

- SB1235 work is done this FY
- Validation testing cycle 2 changes result in significant schedule impacts
- ~20% of overall change order hours

FY25-27 Project Extension Costs



MBS:
\$ 96 K

- Extension of current resources.
- Additional custom tables.

Linea:
\$ 2 M

- Extension of current resources and increased allocation during Parallel Testing.
- Addition of new resources.

Vitech:
\$ 2.7 M &
\$ 400 K (Leg.) &
\$ 900 K (Data)

- Extension of current resources.
- Additional resources.
- New sprint for SB1235 / Public Act 103-0548
- Additional data transformation hours FY25-27.

Future Cost Risks by Vendor



Known Unknowns

- Vitech
 - Interface file development hours
 - Reciprocal portal changes
- MBS
 - Data conversion of RSP and Death
 - Participant Account map changes
- Linea
 - Additional resource support

Context from PAS Vendor Procurement

Vitech remains at a lower cost than the other finalist.

New net differences exceed extension costs from MBS and Linea.



	Implementation through Warranty	Total 10-Year Projection
Sagitec	\$ 29,872,983	\$ 40,441,910
Vitech - Original	\$ 20,152,350	\$ 25,164,170
Difference	\$ 9,720,633	\$ 15,277,740
Vitech - New	\$ 24,952,350	\$ 28,775,110
New Net Difference	\$ 4,920,633	\$ 11,666,800

Budget Ask by Fiscal Year

Vendor	FY24	FY25	FY26	FY27	FY28	Totals
Vitech	\$770,000	\$2,128,575	-\$415,900	\$1,420,000	\$897,325	\$4,800,000
Linea		\$948,605	\$948,605	\$133,080		\$2,030,289
MBS		\$50,000	\$45,672			\$95,672
All FY Totals	\$770,000	\$3,127,180	\$578,377	\$1,553,080	\$897,325	\$6,925,961
				FY25 – FY28 Total		\$6,155,961



What percent of the original project budget total* is each change order?

Project Budget Total	\$ 26,427,315
-----------------------------	----------------------

Vendor	Extension Change Order	Percent of Total Budget
Vitech	\$ 4,800,000**	18.2%
Linea	\$ 2,030,289	7.7%
MBS	\$ 95,627	0.4%
Totals	\$ 6,925,961	26.2%

*Budget total includes Implementation through Warranty. Ongoing maintenance is not included.

** Includes data transformation change orders.

Mitigation Strategies to Prevent Further Changes

“An ounce of prevention is worth a pound of cure.”
- Benjamin Franklin



Go-live planning early and throughout the project

Manage scope more aggressively

Improve expectations setting

Focus more on preparation of sprints

Actively review test scenarios at start of sprint

Avoid overlaps between Validation Testing and holidays with sprints

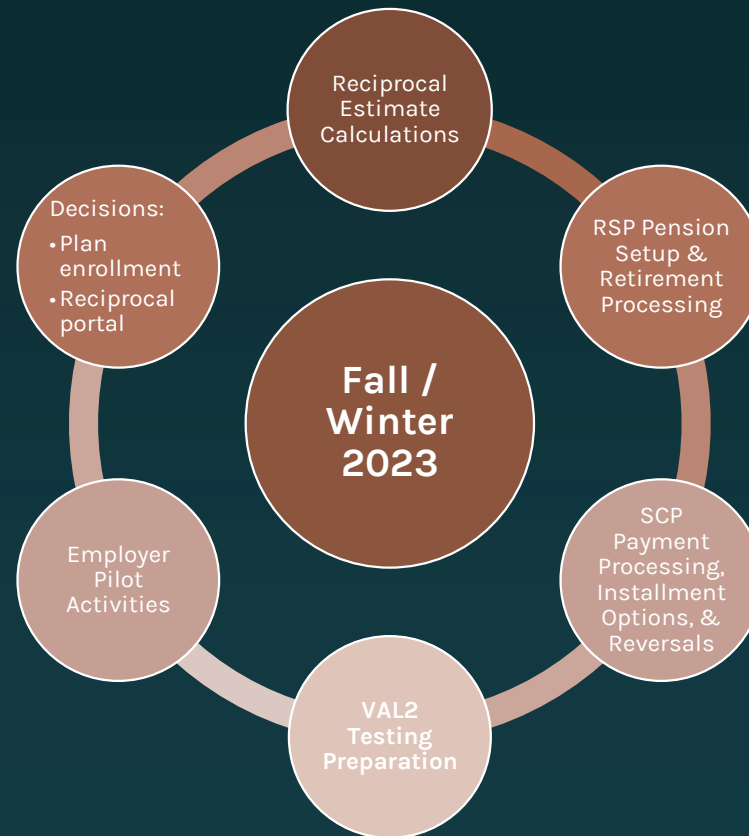
Increase change management efforts

Increase in person interactions

Communicate with SURS early and often to find alternatives to complexity

Next Steps & Looking Ahead

1. Approve related change orders.
2. Update project schedule and budget baselines.





LINEASOLUTIONS

Questions?





MBS

A Sealaska Company



Data Cleansing and Migration Services for SURS:

Project Velocity Extension Request

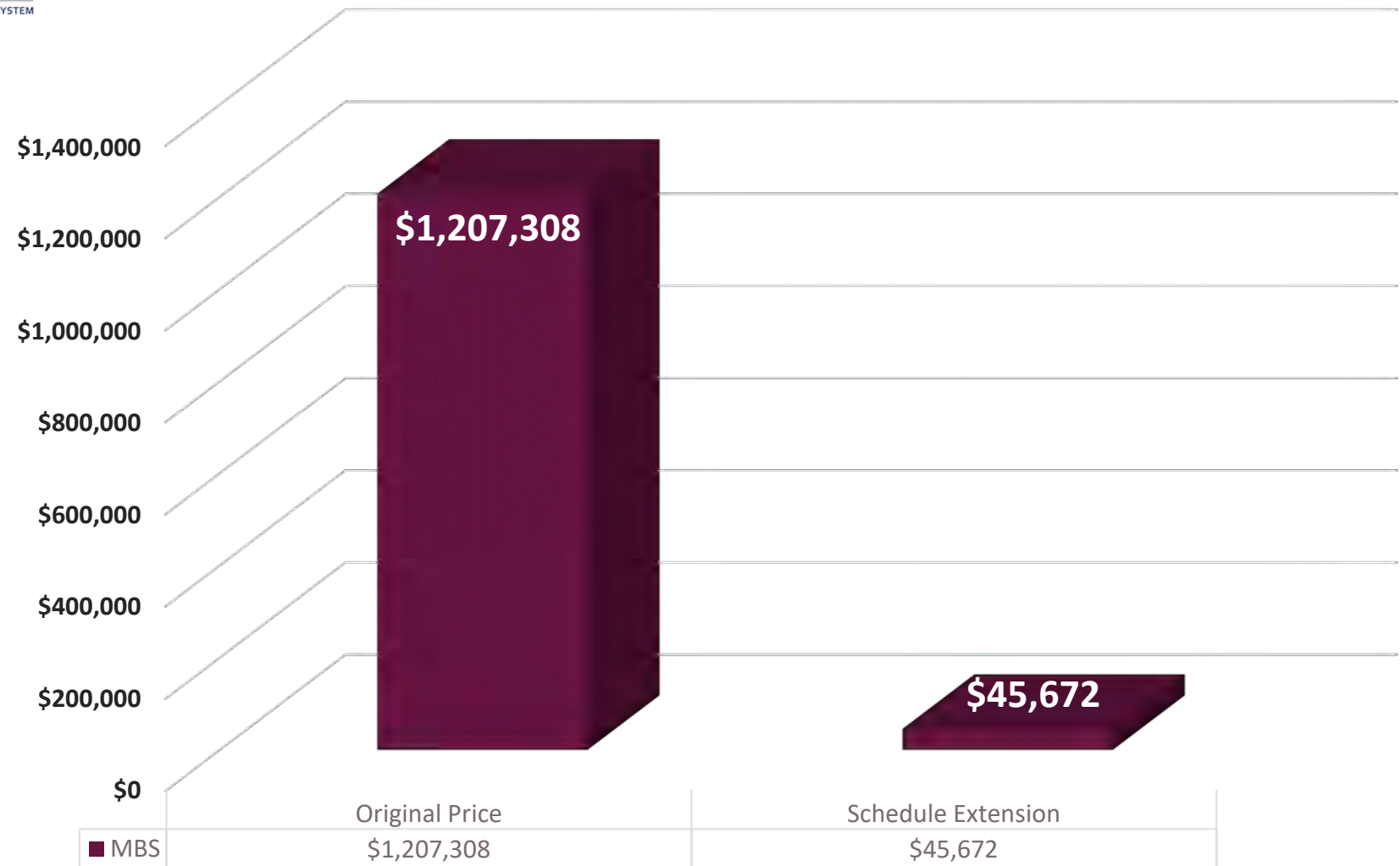
Champaign, IL

September 2023

MBS: Alicia DeVore and Matt Swaffer



MBS: Amendment #10 - Schedule Extension






Schedule Extension Change Order Details

SURS Amendment #10: Schedule Extension	Unit Price	Payment Milestone	Quantity	Total Price
Run Profiling	\$850	per Month	8	\$6,800
Project Management: • MBS Team: Status & Maintenance	\$2,396	per Month	8	\$19,168
Attend Meetings: • Data Issue Review Meetings	\$2,463	per Month	8	\$19,704
Total Amendment #10				\$45,672



Expected Change Orders

	Amendment #11	Amendment #12
Description	RSP Spark File Status <ul style="list-style-type: none"> ▪ Tables Affected: <ul style="list-style-type: none"> ○ Member Contract ○ Person ○ Part Account Detail (all 14 data sources)	Pension Application Table <ul style="list-style-type: none"> ▪ Status ▪ Sub Status
Price	\$15,456 To be paid from contingency	Estimate is \$50,000 Dependent on future design of Death Claims

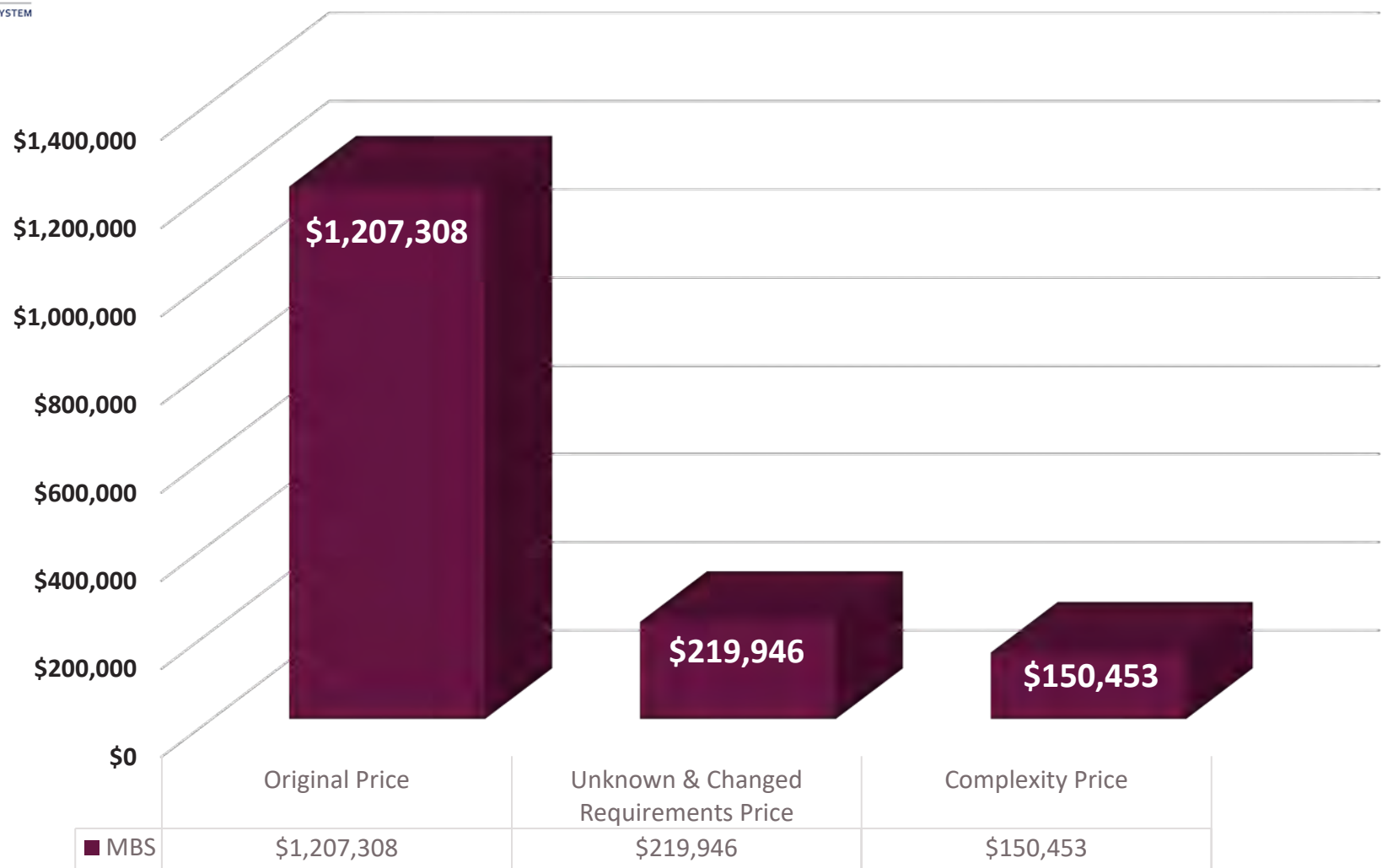


TOTAL BUDGET REQUEST FY25 – FY27

\$ 95,672



MBS: Price Increase for Prior Amendments



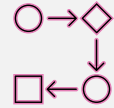
Impacts / Outcomes



Direct Impacts: Complex Requirements

Added Complexity:

- Workflow has a large data set
 - Over 15 million workflow steps
 - There are approximately 3,000 value combinations of Member requests and workflow steps



MBS Outcomes

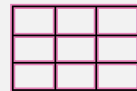
- Increased meeting time for data mapping
- Increased complexity of data maps, transformation rules, and scripts



Indirect Impacts: Unknown/Changed Requirements

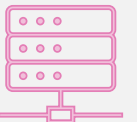
Additional Data Sources:

- Part Account Detail Table
 - Added 14 additional data sources
- Service Credit Purchase
 - Data transformation rules rewrite
 - New validation rules
 - Additional Columns added to data maps



MBS Outcomes

- Increased meeting time for data mapping
- Increased complexity of data maps, transformation rules, and scripts





LINEASOLUTIONS

Project Velocity Extension & Resourcing for Linea

SURS Project Velocity

September 2023



Background on Linea's Project Allocations



**January
2023:**

- Linea business analyst added to lead artifact development during Implementation phase only
- Adjustments made for \$0 change order:
 - PM reduced to 75% allocation
 - Cyber security reduced to 2.5% allocation
 - Parallel testing support is minimal
 - Warranty support is 6 months long and minimal

**June/July
2023:**

- Linea QA resources added to help with testing in FY24
 - Contingency funded
 - No SURS Trainer onboarded yet

Provision ...

- The Linea proposal takes into consideration the current level of SURS resourcing.
- If additional SURS resources are hired to support the project, then the proposed Linea resource levels can be reduced at SURS's discretion.
 - Business Analysis
 - Project Management
 - Quality Assurance / Testing
 - Training

Linea's Proposal: Extension & Additional Support

Implementation through UAT Phase Allocation

- 9-month extension of existing resources
- Add QA Analyst at 50% for VER cycles
 - Increase to 100% for VAL3 - UAT
- Add a Trainer at 50%
 - Increase to 100% before UAT

Parallel Phase Allocation

- Increase PM to 50%
- Increase Testing Lead to 100%
- Increase BA to 50%
- Keep Trainer at 15%
 - Increase to 100% before Go-Live

GOAL

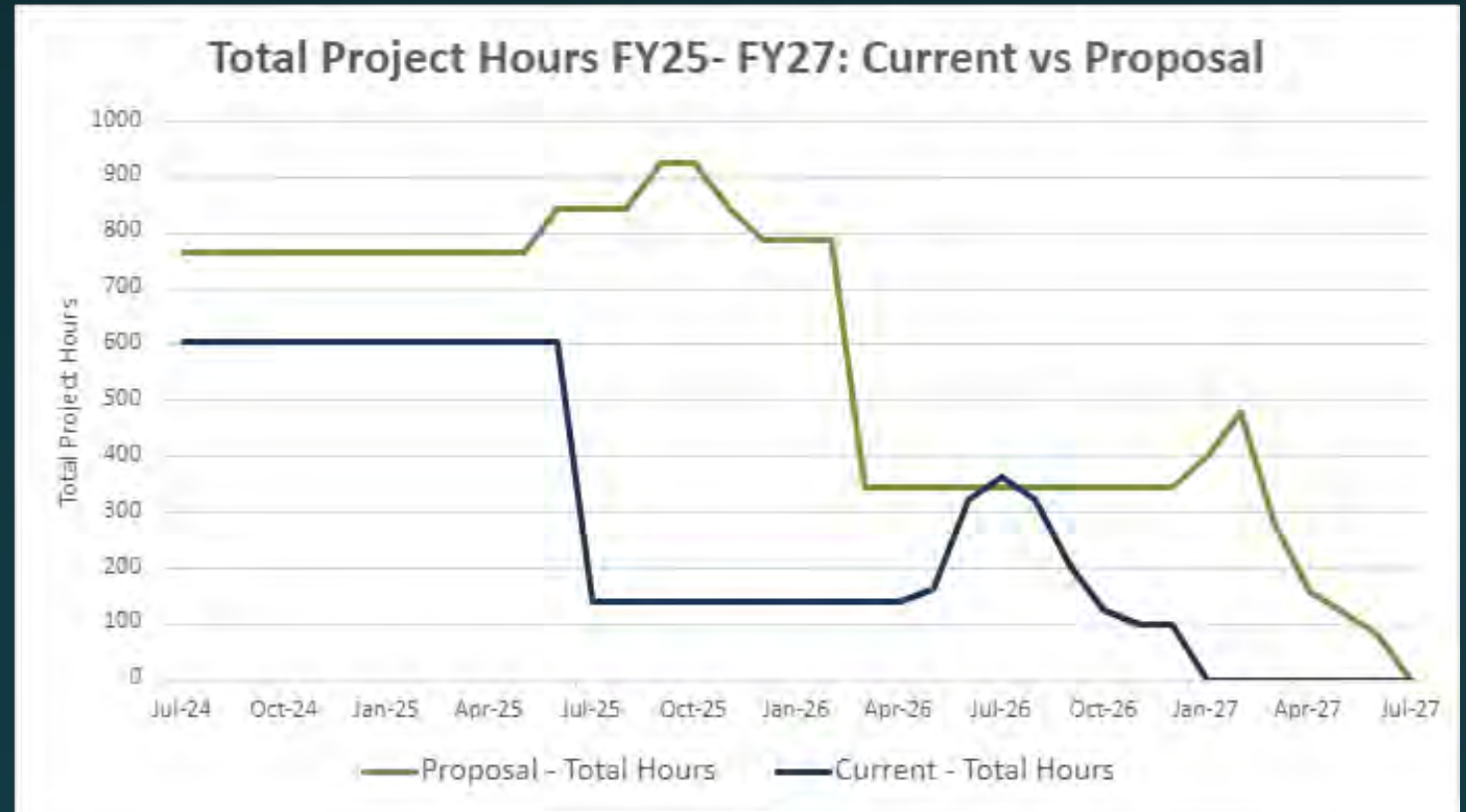
Better meet SURS's resource needs for successful project execution via additional support.

Comparison of Total Project Hours to Completion

Proposal Hours =
20,952

Current Hours =
10,352

Difference in Hours =
10,600





New Total Project Budget for Linea by FY & Net Change Order

FY	Proposal
2025	\$ 1,913,600
2026	\$ 1,653,440
2027	\$ 808,960
2028	\$ 0
Total	\$ 4,376,000

\$4,376,000

- New Total Cost

—

=

\$2,345,711

- Remaining Budget

\$2,030,289

- Change Order Amount



LINEASOLUTIONS

Questions?





Project Velocity Vitech 33-Week Extension

Incremental Hours

September 2023

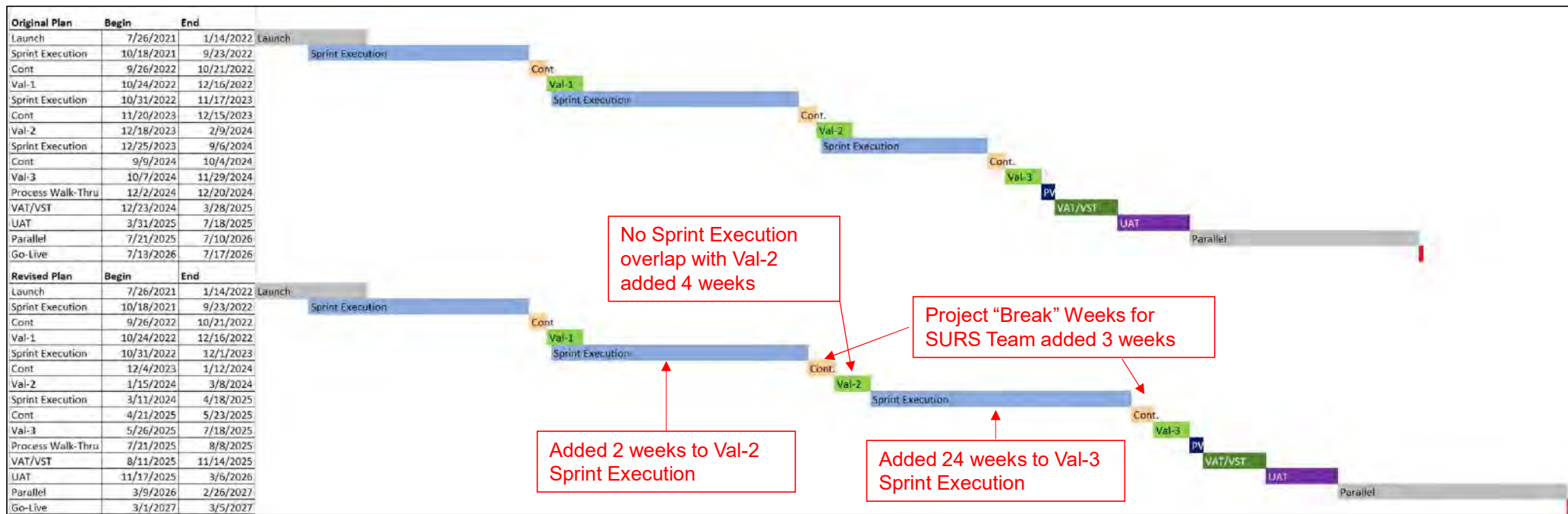


Extension Overview

- The Project Extension adds 33 Weeks (8.5 months) to the project timeline
 - 26 weeks for 6 additional Sprints:
 - 3 Pension “Catch-Up” Sprints
 - 2 New Sprints for additional RSP Requirements
 - 1 New Sprint to accommodate impact of Senate Bill 1235
 - 7 weeks to accommodate SURS Resource Constraints
 - 2 “SURS Break” weeks for SURS team prior to holidays in 2023
 - 1 “SURS Break” week for SURS team prior to Validation Testing Cycle 3
 - 4 weeks to prevent Sprint Execution overlap with Validation Testing Cycle 2 testing



Timeline Comparison





Hours Estimate

- On average, the Vitech Team has worked 6,500 – 7,500 Hours on each 10-week Sprint (not including Data Transformation Team Hours).
- The Project typically runs 2 concurrent Sprints to limit demand on SURS resources, however the revised plan will:
 - Run a few cycles of 3 concurrent Sprints in to avoid pushing go-live out even further. Vitech will increase staff hours during those periods to accommodate greater workload.
 - Overlap the initial preparation weeks for the Senate Bill 1235 Impacts Sprint with other Sprints, but Vitech will use the Contingency Period to complete configuration, development, and testing activities.
- Estimated total hours added ~ 45,140



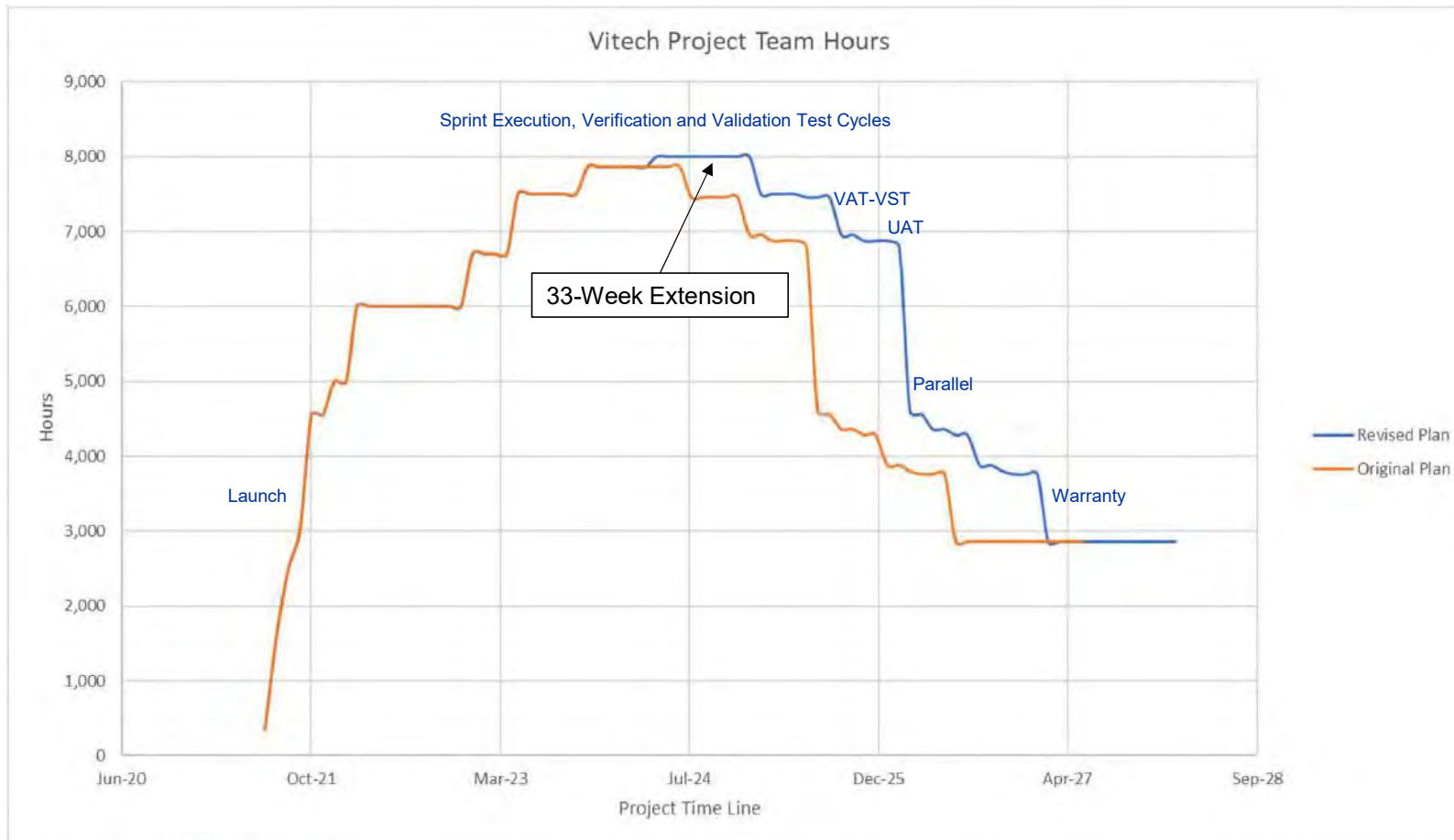
Resource Replan for 33-Week Extension

Estimated Additional Vitech Hours by Resource Group

Resource Group	Pension	RSP	SB1235	SURS Break	TOTAL
PMO/Practice Lead (US)	756	504	104	80	1,445
Sr. Team Lead (US)	1,922	1,281	414	178	3,795
Analyst/Config Specialist (US)	2,941	1,961	932	417	6,250
OffShore	15,921	10,614	4,977	2,138	33,650
TOTAL	21,540	14,360	6,427	2,813	45,140



Hours Comparison





Project Extension – Change To Service Fees

Service Fees - Original

Service Fees	FY-2021	FY-2022	FY-2023	FY-2024	FY-2025	FY-2026	FY-2027	FY-2028	Total
Monthly Operations	\$0	\$1,800,000	\$1,800,000	\$1,800,000	\$1,350,000	\$450,000	\$0	\$0	\$7,200,000
Project Milestones	\$0	\$1,305,000	\$1,584,000	\$1,530,000	\$1,679,850	\$1,917,325	\$897,325	\$0	\$8,913,500
Total	\$0	\$3,105,000	\$3,384,000	\$3,330,000	\$3,029,850	\$2,367,325	\$897,325	\$0	\$16,113,500

Service Fees - Revised

Service Fees	FY-2021	FY-2022	FY-2023	FY-2024	FY-2025	FY-2026	FY-2027	FY-2028	Total
Monthly Operations	\$0	\$1,800,000	\$1,800,000	\$2,170,000	\$4,030,000	\$600,000	\$300,000	\$0	\$10,700,000
Monthly Operations - SB1235	\$0	\$0	\$0	\$400,000	\$0	\$0	\$0	\$0	\$400,000
Payment Milestones	\$0	\$1,305,000	\$1,584,000	\$1,530,000	\$628,425	\$1,051,425	\$1,917,325	\$897,325	\$8,913,500
Total	\$0	\$3,105,000	\$3,384,000	\$4,100,000	\$4,658,425	\$1,651,425	\$2,217,325	\$897,325	\$20,013,500

Service Fees - Change

Service Fees	FY-2021	FY-2022	FY-2023	FY-2024	FY-2025	FY-2026	FY-2027	FY-2028	Total
Monthly Operations	\$0	\$0	\$0	\$770,000	\$2,680,000	\$150,000	\$300,000	\$0	\$3,900,000
Payment Milestones	\$0	\$0	\$0	\$0	(\$1,051,425)	(\$865,900)	\$1,020,000	\$897,325	\$0
Total	\$0	\$0	\$0	\$770,000	\$1,628,575	(\$715,900)	\$1,320,000	\$897,325	\$3,900,000

Data Transformation Change Orders

Service Fees	FY-2021	FY-2022	FY-2023	FY-2024	FY-2025	FY-2026	FY-2027	FY-2028	Total
CO Fees					\$500,000	\$300,000	\$100,000	\$0	\$900,000

Total: \$4,800,000



Overall Cost Summary

With Revised Service Fees for Project Extension

	FY-2021	FY-2022	FY-2023	FY-2024	FY-2025	FY-2026	FY-2027	FY-2028	FY-2029	FY-2030	FY-2031	Total
Subscription Fees	\$0	\$645,000	\$430,000	\$460,000	\$800,000	\$1,129,425	\$1,168,955	\$1,209,869	\$1,252,214	\$1,296,042	\$659,166	\$9,050,670
Service Fees	\$0	\$3,105,000	\$3,384,000	\$3,700,000	\$4,658,425	\$1,651,425	\$2,217,325	\$897,325	\$0	\$0	\$0	\$19,613,500
Service Fees - SB1235	\$0	\$0	\$0	\$400,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$400,000
Additional Data Transformation Change Order Fees	\$0	\$0	\$0	\$0	\$500,000	\$300,000	\$100,000	\$0	\$0	\$0	\$0	\$900,000
Total	\$0	\$3,750,000	\$3,814,000	\$4,560,000	\$5,958,425	\$3,080,850	\$3,486,280	\$2,107,194	\$1,252,214	\$1,296,042	\$659,166	\$29,964,170



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To: Administration Committee
From: Jefferey S. Saiger, Chief Technology Officer
Date: 09/07/2023
Re: Project Velocity Update

The SURS Information Technology Department is here before the Administration Committee today to present an update regarding Project Velocity; our ongoing project to replace our legacy pension administration system (PAS) with one that is built upon modern technology and design principles.

As discussed previously, the project has encountered significant scope and scheduling challenges that has necessitated our reevaluation of the project timeline. During that reevaluation, it was ascertained that the greatest chance for success moving forward would be to extend the project timeline. This would ensure that all identified work items could be adequately addressed.

Presenting today will be Erica Oropeza, our lead project manager from implementation partner, Linea Solutions. She will be joined by Catherine Dietrich, a project manager with Vitech and Alicia DeVore, a project manager with MBS. They will discuss what the extension for the project timeline would look like, as well as the additional costs that would be entailed.

Thank you for your time and attention.

***That based on the recommendation of SURS staff and Linea, the suggested Project Velocity timeline extension and associated additional costs in the amount of \$6,925,961 be approved for the SURS PAS project which includes and FY24 budget increase of \$770,000.00 to cover new costs incurred before the end of FY24 and the rest of the additional costs to be incorporated across the remaining FY years where needed for the PAS project, all of which will be memorialized in a written contract amendment with Vitech that is subject to successful completion of contract negotiations.**