



www.suaa-ui.org

The Annuitant

A publication of the UIUC Chapter
State Universities Annuitants Association

Spring 2023

Melinda Carr and Carol Livingstone, Co-Editors

Avoiding Retirement Regrets: Perspectives from Business and Social Work

***Brown and Korr Headline SUAA-UIUC Meeting
Tuesday June 13, 6 pm***

***Alice Campbell Hall Ballroom
601 S. Lincoln Avenue, Urbana
Debbie Kemphues***

We look forward to hearing from Dean Jeff Brown and Dean Emerita Wynne Korr. They will discuss the importance of being prepared, having goals, and then periodically reflecting on those goals. Dean Brown will focus on financial preparedness. Dean Korr will speak about the importance of time for reflection and re-adjustment and building resilience to life challenges.

Originally scheduled for last fall but postponed due to the TRAIL health insurance town meeting (see page 3), this presentation should be of interest to all, whether retired or still planning for retirement. Zoom connection information will be posted on the chapter website: www.suaa-ui.org.

Jeffrey Brown has served as the dean of UIUC's Gies College of Business since 2015. He is the Josef and Margot Lakonishok Professor of Business, in the department of Finance, and his research focuses on the interaction of public and private insurance markets. Wynne Korr served as dean of the School of Social Work at UIUC from 2002-2017. She is a professor in Social Work, with her research focusing on mental health policy and services as well as social work education.

We hope you will join us for a wonderful evening of thought-provoking discussion and reconnection with friends.

President's Report

Matthew J. Wilson, President, SUAA UIUC Chapter

I hope this newsletter finds you well and you are enjoying springtime in central Illinois or wherever you may be.

This is my first message since succeeding John Marlin as Chapter President in January and I'd like to thank him for all his work on behalf of our Chapter. John initiated many meetings with stakeholders and led the effort to organize the public forum held last fall which allowed SUAA members to hear from state leaders and ask questions regarding the transition from United Healthcare to Aetna for TRAIL, the state's health plan for Medicare-eligible retirees. I'm pleased that John will continue to serve on the Executive Committee as Vice President.

I would also like to recognize two individuals who are completing their second terms on the Executive Committee and have played such important roles for the Chapter, Debbie Kemphues and Carol Livingstone. Debbie has served as Secretary and Chair of the Program Committee. Carol has served as Webmaster, Newsletter Co-Editor, and Chair of the Communications Committee. We look forward to their continued involvement and contributions.

The following people have been nominated to fill Executive Committee vacancies for 2023-2026: Michael Grossman and Vera Mainz, running for the two vacant positions, and Bettina Francis and Tanya Gallagher. Bettina is running for a second term; Tanya was appointed last fall to fill the remainder of a
(continued on page 2)

SUAA-UIUC CHAPTER LEADERSHIP 2022-23

(Committee assignments are shown in italics)

~ OFFICERS ~

President

Matthew J. Wilson* - *Program*

Vice President

John Marlin* - *Program*

Secretary

Debbie Kemphues* - *Program*

Treasurer

Ron Webbink

~ OTHER EXECUTIVE COMMITTEE ~

William Adams* - *Legislative*

Marissa Brewer* - *Communications, Legislative*

Melinda Carr* - *Membership, Communications,
Newsletter Co-Editor*

Bettina Francis* - *Communications*

Tanya Gallagher*

Wynne Korr* - *Legislative, Audit*

Carol Livingstone* - *Webmaster,
Communications, Newsletter Co-Editor*

Deborah McCall* - *Program*

Deb Stone* - *Benefits*

Donald Uchtmann* - *Audit*

*(*members of the Executive Committee)*

~ OTHER COMMITTEE MEMBERS ~

Thomas Conry - *Legislative*

Rick Schoell - *Legislative*

H. F. (Bill) Williamson - *Benefits, Membership*

Richard Winkel - *Past President, Legislative*

~ LIAISONS ~

Cheryl Heck - *Campus*

~ STATE SUAA LEADERSHIP ~

Thomas Conry - *State Vice President*

H. F. (Bill) Williamson - *SUAA Foundation*

~ CHAPTER WEBSITE ~

www.suaa-ui.org

President's Report, continued from page 1

term vacated by Donna Miller and now seeks election to the Executive Committee for a full term.

As COVID restrictions have eased somewhat in Champaign County, the Executive Committee has resumed in-person meetings and chapter members are welcome to attend. A Zoom option is also still available, which allows members to continue on the Committee even after leaving the area. Due to some restrictions on hosting outside groups, our venue has moved from Clark-Lindsay Village to Champaign Country Club. Meeting space there is provided at no cost to the chapter. Meetings are held on the second Wednesday of every month at 1:30 pm. If you have questions or comments or information to share with the Executive Committee, please send an email to president@suaa-ui.org.



Linda Brookhart and State Rep. Michael Marron chat before the October SUAA-UIUC meeting – see p. 3

Follow us on Facebook!



To keep up with the latest information about your pension and benefits, be sure to follow us on Facebook. Search for SUAA-UIUC.

SUAA-UIUC Leads Battle to Protect Retiree Health Care Choices

SUAA-UIUC organized quickly in the late summer and fall of 2022 when the Executive Committee learned of the major threats to medical choices for our members who are Medicare-eligible. By researching the issues, holding a well-publicized and overflowing town-hall meeting, and following up with legislators, SUAA-UIUC was a driving force in informing Medicare-eligible retirees about the changes and ensuring that our members could make educated choices about their healthcare and continue to access care at Carle-affiliated providers. Below is a chronicle of the sequence of events as they unfolded.

Health benefits have always ranked as one of the most attractive parts of the compensation package offered to employees at the University of Illinois. Retirees who had completed 20 or more years of service were guaranteed free health insurance during retirement. Retirees with fewer years of service could purchase health insurance at a sliding cost depending on the number of years of service. In the “fine print” of that guarantee, however, was a requirement that any retiree who also happens to be eligible for Medicare must sign up for Medicare Parts A and B, and pay the costs associated with Medicare. In 2023, these monthly costs range from \$164.90 to \$636.90 depending on income. Retirees in the Medicare system then could choose, at no additional cost, from among Medicare Advantage plans offered through TRAIL, a program run by the Illinois Department of Central Management Services (CMS),

Last July CMS awarded administration of the TRAIL Medicare Advantage programs to Aetna, replacing United HealthCare (UHC), which had administered TRAIL since 2013. Information on details of the proposal from Aetna was limited while two appeals by UHC were considered.

Over the next six months, a high-stakes battle over health care grew in intensity as thousands of retirees gradually became aware that they faced the possibility of losing access to their doctors and health care facilities. Some elderly patients had used the same physician for decades while others were undergoing long-term treatments for cancer and other diseases.

The State Universities Annuitants Association (SUAA), legislators and other interested parties were not overly concerned at first because of CMS’s assurances that there were “no changes to the plan design for the PPO (Preferred Provider Organization)” and that “all deductibles, co-insurance, and out of pocket maximums will remain the same.” CMS is required to request new proposals for plan administrators every five years with the ability to extend the contract for an additional five years. Ten years ago, a public uproar ensued when CMS changed traditional Medicare to the Medicare Advantage plan known as TRAIL.

Once all appeals from UHC were denied in early September, Aetna and CMS began publicizing the details of the new contract. One major change that immediately caused concern was the elimination of a HMO (Health Maintenance Organization) option for retirees living in Illinois. Previously, participants in each Illinois county could choose from at least one HMO and one PPO available through TRAIL. Under the new contract, all TRAIL participants would automatically be placed in the Aetna PPO plan.

This PPO plan was not controversial in most of Illinois as Aetna was widely accepted by many health care providers (for example, doctors, clinics, hospitals, and labs). However, in mid-August retirees in parts of east central Illinois became aware that the Carle group of doctors, hospitals, and clinics did not intend to accept patients using Aetna. Given Carle’s dominance in Champaign, Vermilion and Coles Counties, this news greatly upset a large number of retirees whose care at Carle would no longer be “in network.” Carle stated that “due to historical challenges in dealing with Aetna” it would not accept the plan unless it could reach an agreement with Aetna. SUAA-UIUC decided to mobilize. President John Marlin coordinated the effort, which ultimately involved hundreds of hours of organizing by SUAA and community members. Carol Livingstone, Executive Committee member, agreed to research the new plan and health care options. Several former officers including Steven Rugg and Kathleen Holden provided SUAA-UIUC advice from the last time the insurance administrator was changed ten years *(continued on next page)*

(TRAIL, continued from page 3)

ago and Rugg agreed to lead a group to meet with Carle's CEO. Carle never agreed to meet.

Very little reliable information on the new plan's coverage was available, making it difficult to define the underlying issues and help find a resolution. When called to intervene, legislators often pointed out that this was a bureaucratic agency issue rather than a legislative matter. Further, it was also viewed as a local issue by most statewide stakeholders.

The situation was further complicated by other factors. Over time, federal Medicare reimbursements to Medicare Advantage insurers had increased significantly, now ranging from \$1,000 to \$9,000 per month per enrollee, depending upon their medical condition. These generous payments created intense competition among Medicare Advantage plans. Livingstone discovered, through Freedom of Information requests, searches through the state procurement website, and conversations with the state procurement officer in charge of the new contract, that these increased federal reimbursements allowed both Aetna and UHC to place bids costing Illinois zero dollars starting in 2023. For reference, the state paid UHC \$240 million for TRAIL health insurance coverage in 2022.

Carle's Health Alliance offers several Medicare Advantage plans which competed with Aetna's plan for retiree enrollees; therefore, Carle had no incentive to reach an agreement with Aetna.

As concern grew over the TRAIL program in central Illinois during the early fall, the federal agency overseeing Medicare announced on September 29 that it had downgraded its quality rating for Aetna PPO plans from a 4.5 to 3.5 on a scale of 5. According to the federal government's press release, "Approximately 72% of people currently in Medicare Advantage plans that offer prescription drug coverage are enrolled in a plan that earned four or more stars in 2023."

Due to the confidential nature of the bidding process, CMS could not provide detailed reasons for its decision to select Aetna. However, UHC privately

informed SUAA staff that of about 1500 possible points awarded in the bidding, the difference between Aetna and UHC was only 15 points. It is not clear how many, if any, points in the bidding were awarded for continuity of care or the cost of disruption to participants who would need to change health insurers.

Illinois State Senator Chapin Rose was particularly disturbed by the way CMS handled the decision-making process, and the impact it was having on many of his elderly constituents. He began publishing fact sheets and making presentations detailing his views on the matter. WCIA Channel 3 in Champaign aired a series of detailed stories on the changes. By October the SUAA-UIUC chapter joined forces with several other chapters, including Parkland, Eastern Illinois University and Illinois State University, to draw attention to the issue and publicly encourage Carle and Aetna to reach an agreement. State Representative Mike Marron and Senator Scott Bennett helped generate support for the negotiations. In an unusual move, University of Illinois President Tim Killeen and Chancellor Robert Jones issued a joint letter, published in the News-Gazette, urging the parties to reach an agreement.

In October, the SUAA-UIUC Executive Committee took the extraordinary step of postponing the program originally planned for its fall meeting in order to hold a town-hall style meeting about the changes made to the TRAIL program.

More than 300 members and others crowded into the ballroom of the Alice Campbell Alumni Center on October 25, 2022, and another 300 or so connected to the town hall meeting via Zoom. Senator Bennett and Representative Marron were present (Senator Rose had a prior engagement as did Representative Carol Ammons). Reporters from the News Gazette and area TV stations attended.

Via Zoom, Carol Livingstone presented a brief overview of Medicare and Medicare Advantage plans and some of the changes to the new Aetna plan. She pointed out that retirees might consider leaving the TRAIL program for another health plan on the

open market that would offer comparable (or better) coverage, including plans that would be accepted by Carle. Showing a map of Carle locations, she explained that Carle was hoping to expand well beyond the Champaign-Urbana area. She provided a link to a federal website that compared Medicare Advantage plans to help those considering leaving TRAIL, and showed excerpts from a spreadsheet she had prepared comparing Medicare Advantage plans in the county.

SUAA's Executive Director Linda Brookhart followed with a discussion of the process CMS uses to select a health plan administrator. She was optimistic about the chances of Aetna and Carle coming to an agreement and pointed out that the same problem had occurred previously with Carle when United Healthcare won the contract. She saw no problem in the loss of the HMO option because she believed PPO plans are superior; indeed, only 10% of TRAIL participants had selected the HMO. She urged attendees to write both Carle and Aetna to encourage them to come to an agreement.

SUAA-UIUC President Marlin then opened up the floor to people with comments and questions. Several expressed great concern about losing access to doctors they have used for years. Others were more specific about the emotional trauma of making changes while facing life-threatening illnesses. Some attendees were not convinced there were enough Aetna-affiliated providers in the area if access to Carle was lost. Several asked whether they could return to TRAIL later if they opted out now. The answer is yes, although they might need to wait until the fall open enrollment period.

News coverage of the meeting generated increased pressure on Carle and Aetna to resolve their issues before the commencement of the new contract in January. Below are some of the many interactions that occurred during that time.

Aetna and CMS sponsored meetings around the State between November 1st and 18th to explain the plan. The meetings in east central Illinois, where there was the most controversy and confusion, were scheduled during the last three days. Information packets to retirees were mailed late due to time lost waiting the appeal result. Some people received packets only a few days before the decision deadline of November 30.

John Marlin and Linda Brookhart were invited to a meeting in Springfield of the Commission on Government Forecasting and Accountability which took comments and testimony on the Health Care issue. It was chaired by Senator Dave Koehler who represents the Peoria area where Carle was in negotiation to purchase three hospitals. Several people with serious health conditions explained how the months of uncertainty had impacted them. CMS answered legislators' questions. Senator Rose and Representative Marron spoke, particularly in support of people facing critical procedures like transplants. They, along with Senator Bennett, subsequently began developing legislation to address some of the problems with the procurement process.

It became evident that many hospitals, including Carle, refer patients in need of special care for cancer and transplants to specialists at other major hospitals. Several such hospitals had informed referred patients that they would not accept the Aetna insurance. These patients had begun desperate searches for places to receive care. This situation was untenable and gradually Aetna and most of these hospitals (encouraged by legislative pressure) worked out agreements to cover, at a minimum, the cases of patients with planned or ongoing treatment at these hospitals. SUAA Executive Director Linda Brookhart worked closely with Aetna to facilitate continuing care for these patients.

Carle and Aetna reached an agreement prior to the final deadline. The transition to Aetna for most patients in the Carle area seems to be working rather well. The untimely death of Senator Bennett slowed the legislative process. Some action is anticipated in the future, especially on CMS procedures. The Medicare and Medicare Advantage programs are receiving scrutiny at the national level over payments, costs, and their impact on the health care systems in many states.

SUAA chapters in east central Illinois are now communicating to better address the regional issues with an eye to the future. Our SUAA chapter is proud to have helped bring this matter to a near-term resolution and will remain vigilant as future events unfold.

Videos of the fall meeting, Livingstone's Powerpoint slides, and additional notes and resources are available at suaa-ui.org/trail

SUAA - UIUC Executive Committee Election

Carol Livingstone and Melinda Carr

At the annual meeting in the spring, four SUAA-UIUC chapter members are elected to the twelve-member Executive Committee for three-year terms. Executive Committee members may serve for two consecutive terms if reelected. The Nominating Committee, appointed by the Executive Committee, has proposed a slate of four members according to Article 4.2 of the chapter bylaws. The biographies of these nominees are presented below. Additional nominations shall be requested from the floor. Such nominations require the consent of the nominees. All nominees must be chapter members.

Michael Grossman is Professor Emeritus in the Departments of Animal Sciences and Statistics at the University of Illinois Urbana-Champaign. Before retiring in 2005, he taught, did research, and published in the fields of animal genetics and mathematical modeling in the life sciences. Since retiring, he has been teaching workshops on techniques for writing and presenting a scientific paper to graduate students and staff members at universities, institutes, and companies, mostly in Europe and Asia. At UIUC, Michael served as chair of the university-wide Senates Conference and of the Senate Executive Committee, and as chair or vice-chair of several Senate committees. He is currently a member of the Senate Committee on University Statutes and Senate Procedures. He served also as Associate Dean of the Graduate College and as Associate Head of Animal Sciences. A long-time member of the Policy Committee of the UIUC Chapter of the AAUP, he has written and spoken extensively on the topic of shared governance. He seeks his first term on the SUAA-UIUC Executive Committee.

Bettina Francis retired in 2020 from her position as Associate Professor of Environmental Toxicology in the Department of Entomology in the School of Integrative Biology. She earned her Ph.D. in Genetics at the University of Michigan in 1973, and joined the faculty at the University of Illinois in 1981. At the University of Illinois, she has taught courses in introductory zoology and environmental toxicology. She has been active in the Senate of the Champaign-Urbana Campus, serving as chair of the Educational Policy Committee, and then chair of the Senate Executive Committee for two terms. She has also been a long-time member of the Policy Committee of the UIUC Chapter of the American Association of University Professors, including serving as Vice President of that organization. Bettina is seeking her second term on the SUAA-UIUC Executive Committee.

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Vera Mainz retired after 25 years as Director of the NMR Lab in the School of Chemical Sciences at the UIUC in 2010. She received a B.S. in Chemistry and Mathematics from Kansas Newman College, a Ph.D. in Inorganic Chemistry from the University of California Berkeley, and held a postdoctoral position at UIUC. Vera was the LAS representative to the UIUC Council of Academic Professionals (CAP) from 1994-2007, and served as the CAP Grievance Officer from 1999-2007. She served as the CAP Liaison to the UIUC University Senate Statutes and Procedures Committee from 1998-2020. Her honors include the LAS Academic Professional Award in 1994, the School of Chemical Sciences Outstanding Academic Professional Award in 1999, and the Chancellor's Academic Professional Excellence (CAPE) Award in 2001. She has been a member of the American Chemical Society (ACS) since co-founding a student chapter of the ACS on her college campus in 1975. She joined the HIST Division of the ACS in 1994 and has served as Secretary-Treasurer of the Division since 1995. Vera's interest in the history of chemistry led her and her husband to curate two exhibits at the University of Illinois Rare Book Room. Vera was a member of the ACS Fellows Class of 2012, which honored her

contributions to the ACS. She seeks her first term on the SUAA-UIUC Executive Committee.

Tanya Gallagher is Professor of Speech and Hearing Science, the Timothy J. Nugent Professor in Rehabilitation Research, and former Dean of the College of Applied Health Sciences from 1998-2016. She received her BS, MA and PhD degrees from the University of Illinois and, prior to joining the faculty in 1998, served on the faculties of the University of Michigan Medical School and the McGill University Faculty of Medicine. Tanya has held several leadership positions including serving as the President of the American Speech-Language-Hearing Association, the President of the International Association of Logopedics and Phoniatrics, the President of the Communication Sciences and Disorders Clinical Trials Research Group, and as an advisor to the National Center for Treatment Effectiveness Research in Communication Disorders. She has received the most prestigious awards in her field, has published extensively and is an internationally recognized scholar in language disorders and treatment outcomes. Appointed last fall to fill a vacancy on the SUAA-UIUC Executive Committee, Tanya now seeks election to a full term.

SUAA Foundation

H. F. (Bill) Williamson

The SUAA Foundation, a not-for profit organization associated with SUAA, has a program to provide up to \$1,500 in emergency assistance to persons who have been SUAA members for at least five years and are facing a sudden need for funds to cope with a crisis.

The Foundation also provides scholarships to SUAA members or their family members who are enrolled in an accredited degree program, eligible technical/trade program, or an eligible certificate program.

Grants of up to \$1,000 annually are also available for professional development activities for applicants who are SUAA members in good standing and currently employed at an Illinois institution of higher education.

Further information, eligibility requirements, and application procedures for these programs are available on the Foundation link at the state SUAA website. We hope that you will consider providing support to the Foundation so that we can continue these programs. Contributions can be made by mailing a check payable to "SUAA Foundation" to: SUAA Foundation; 217 E. Monroe Street, Suite 100; Springfield, IL 62701. Contributions can also be made by using a credit card through the link available at www.suaa.org.

Benefits Report

Carol Livingstone

One of the most important services SUAA provides is monitoring changes in benefits programs for SURS annuitants. Members receive monthly briefings detailing bills or proposals before the Illinois Legislature that might affect the pension or benefits of annuitants.

COVID-19

Proof of vaccination is no longer required for UIUC building access; masks are not required except at health centers: McKinley Health Center, the Counseling Center, the COVID-19 testing site, etc.

Those in the Champaign-Urbana area with an I-card can have a free, saliva-based test for the virus at the campus testing site located just inside the Campus Recreations Center East. An appointment is recommended but walk-ins are also welcome. Enter via the east entrance opposite Allen Hall. Visit covid19.illinois.edu for further information regarding this testing. The Champaign-Urbana Public Health website (c-uphd.org) contains useful information about COVID-19 transmission rates.

Benefits Choice Periods

May 1 to May 31 is the next Benefits Choice period for those currently working and retirees who are not eligible for Medicare; changes will be effective July 1. The booklet outlining the changes in programs along with instructions for making changes in benefit elections is available online at the MyBenefits Marketplace website; it will be mailed out as well. The CMS information should be carefully reviewed. (For those eligible for Medicare, the annual benefits choice period is generally October 15-November 15, with coverage changes effective January 1.)

Claim Payment Delays

Funding availability for the state health plans is based on State revenue, which fluctuates. Claims paid more than 30 days late will be accompanied by an interest payment. Updated information regarding such delays appears on the CMS website under State

Employee Benefits (Claim Payment Delays). As of April, 2023, there was no delay in payment of any claims.

i-Card & Net ID

Your i-card is your passport to many benefits, services, and discounts as well as free rides on the Champaign-Urbana bus system. If you've misplaced yours or not updated it since retirement, visit or call the i-card center in the Illini Union Bookstore for a replacement. Their phone number is 1-217-244-0135. See the perks available with an i-card at

<https://www.icardperks.uillinois.edu/discounts/>.

Human Resources also maintains a list of services available to retirees such as library access and free tuition for university courses. Visit

<https://humanresources.illinois.edu/retirees/benefits-services.html> to explore the options available.

Hand-in-hand with your i-card is your net ID and password, which are required for access to online resources at the university. Contact UIUC's Office of Technology Services at (217) 244-7000 if you have not established your net ID or if you have forgotten your password.

Volunteer Corner

SUAA-UIUC welcomes additional hands and minds participating in this group. Email us at suaa@suaa-ui.org to support the chapter in any of the following areas:

- Planning social activities
- Planning chapter meetings
- Recruiting & retaining members
- Writing & editing this newsletter
- Maintaining the chapter website
- Serving on the benefits committee
- Serving on the legislative committee
- Serving on the SUAA-UIUC executive board

Important Sources of Information about Your Pension & Benefits

State Universities Retirement System (SURS)

URL: <http://surs.com/>

Phone: (800) 275-7877 or (217) 378-8800

Fax: (217) 378-9800

Mailing Address: SURS, P.O. Box 2710,
Champaign, IL 61825-2710

Street Address: 1901 Fox Drive, Champaign

SURS is our pension system. Once registered on the website, current employees will have access to historical pay and pension calculators to help plan for retirement. After retirement, annuitants can view information about pension payments and deductions and can update addresses, beneficiaries, phone number, email address, and federal tax withholding status.

During tax season, copies of 1099-R forms can be downloaded from the site.

Central Management Services (CMS) (For State Employees)

URL: illinois.gov/cms/benefits

Phone: (800) 442-1300 or (866) 277-5669 (TTY)

Email: CMS.Ben.BCS@illinois.gov

CMS negotiates all benefit packages for employees and retirees.

When browsing through the information on the CMS website, remember that UIUC employees are considered “State Employees” and are enrolled in the “State Employees Insurance program”. CMS has detailed insurance coverage information as well as claims delays and Benefits Booklets for Benefits Choice periods.

State Universities Annuity Association (SUAA)

URL: www.suaa.org

Phone: (217) 523-4040

Address: 217 East Monroe Street, Suite 100
Springfield, IL 62701

Email: suaa@suaa.org

SUAA advocates on behalf of SURS retirees, current employees, and their dependents and survivors to preserve retirement and healthcare benefits. Members have special access on the website. Membership forms available online.

MyBenefits Marketplace

URL: <https://mybenefits.illinois.gov/>

Phone: (844) 251-1777 or (844)251-1778 (TTY)

MyBenefits is a website designed to help employees or annuitants make changes to their insurance coverage during the Benefits Choice period. Members can also call a State group insurance customer service representative at the number above. This is also where you sign up for TRAIL (Medicare Advantage Plan).

TRAIL (Total Retiree Advantage IL)

URL: illinois.gov/cms/benefits/trail

(follow link to “State Insurance Program”)

Phone: (844)251-1777 or (844)251-1778 (TTY)
(same as MyBenefits)

Fax: (844) 676-1725

Email: cms.ben.medicarecob@illinois.gov

TRAIL manages a suite of State Medicare Advantage plans for retirees who are eligible for Medicare. The website has open enrollment materials and shows coverage information and monthly costs based on years of service.

Social Security and Medicare (Champaign Office)

Social Security URL: www.ssa.gov

Medicare URL: www.medicare.gov

Phone: (877) 819-2593

(800) 325-0778 (TTY)

Address: 101 S Country Fair Dr, Champaign

Help Us Recruit New Members to SUAA!!

SUAA's strength and effectiveness depend directly on the number of members. If you are already a member, encourage your colleagues, friends, and family members who are SURS participants to join. Show them this newsletter and send them a link to our chapter's website (www.suaa-ui.org) so they can see the work that is being done on their behalf in Springfield and here in Champaign-Urbana. If you are a user of social media, "like" the SUAA UIUC Facebook page and "share" its postings so your friends can see them.

We encourage you to have your dues deducted from your paycheck (if still employed) or your pension (if an annuitant). Your membership will renew automatically each year without your having to write a check or spend money on a stamp. Dues are only \$3.92 per month. Download the membership form today from the suaa-ui.org/join.htm website; complete, sign, and submit the form as directed. Your dues will be deducted monthly when your current membership expires.

If you are not yet a member – Your support through membership dues is important as we continue work to protect the future of our pension system, health benefits, higher education and general welfare of our membership. Visit our web page at www.suaa-ui.org/join.htm for easy instructions.

Dues are only \$47 per year – \$39 goes to the state SUAA organization and \$8 stays with our local chapter.

Your support is essential and we hope that this information will persuade you to join us!

SUAA is **your** voice at the Capitol; SUAA works hard to make your concerns heard loud and clear by state legislators and the Governor's office staff. SUAA provides a communications network through emails, legislative bulletins, websites, and workshops/meetings that informs and updates members on both local and state issues relative to and focused on pension and healthcare benefits.

What has SUAA done for you?

- Represented all SURS participants and beneficiaries by suing the State of Illinois over Senate Bill 1 (Public Act 098-0599), pension reform. The Supreme Court found the law unconstitutional, saving average pensioners HUNDREDS OF THOUSANDS OF DOLLARS over the course of their retirement.
- Led the charge to defeat adding a new section to Article XIII, Section 5 of the State Constitution, which would have been an attack on SURS employees and retirees.
- Stopped legislation that would abolish tuition waivers for university personnel.
- Supported legislation in Springfield to strengthen health care and pension benefits for SURS members.
- Actively lobbied the Legislature to prevent changes to the Constitution that would harm SURS retirees and active members, such as eliminating the "pension clause".
- Protected faculty forced to take furloughs during the state's budget crisis.
- Analyzed and publicized the consequences of CMS's switch to Aetna in 2022 as TRAIL administrator and lobbied for Aetna and Carle to reach an agreement on coverage for retirees.

From one of our members: *“For me, just the action of SUAA-UIUC in addressing the recent TRAIL issue was well worth the modest annual dues I pay. There is no substitute for action when action is needed.”*

Biannual Audit of Chapter Financial Records

Don Uchtmann

Association bylaws, effective December 6, 2020, require an audit of financial records *in even numbered years*. The Executive Committee appointed Wynne Korr and Don Uchtmann (Chair) to conduct an audit which was completed in December 2022. The audit report to the Executive Committee contained the following summary:

1. Treasurer Records were complete and well organized.
2. The audit of Fiscal Year 2021 and the first 10 months of 2022 revealed no anomalies.
3. A less formal review of financial records for the seven years preceding FY2021, the initial years when Ron Webbink was Treasurer, was conducted for the benefit of both the Treasurer and the Chapter. This less formal review found no financial anomalies.
4. The Audit Committee thanks Ron Webbink for his excellent cooperation during the audit and for his nearly nine years of dedicated, meticulous, volunteer service as Treasurer of the SUAA-UIUC Chapter.

The report offered recommendations regarding management of the chapter's cash flow needs and reserves – recommendations that would keep our reserves FDIC-Insured while also increasing interest income. These recommendations were reviewed by the Executive Committee and implemented in January, 2023. See the Treasurers' report below for additional information.

Treasurer's Report for the Year Ended December 31, 2022

Ronald F. Webbink, SUAA-UIUC Treasurer

SUAA represents annuitants and employees of Illinois Public Universities and Colleges. The UIUC Chapter has no employees, only volunteers. The SUAA office in Springfield has employees whose principal duty is advocacy on behalf of SURS annuitants, to protect our retirement, survivor, and health insurance benefits. Of your \$47 annual dues, \$39 was for SUAA and \$8 for our Chapter, SUAA-UIUC. The 2022 revenues and expenses for SUAA-UIUC were:

Total revenues (itemized below*)		\$12,587
Dues	\$12,590	
Interest (less CD early withdrawal penalty)	\$3	
Total Expenses (itemized below)		\$9,324
The Annuitant newsletter (printing)	\$3,904	
Meeting expenses (local, regional, state)	\$4,061	
Website hosting	\$49	
Gain (loss) in reserves		\$3,263

**Total Revenues exclude temporary cash inflows of principal from redeeming CDs in December 2022; these temporary cash inflows of reserve funds were offset, dollar for dollar, in January 2023 by transfers to our new investment account at Morgan Stanley. See below.*

Looking ahead to 2023: A new investment account has been established with Morgan Stanley. This new investment account enables the Chapter to (a) deposit reserves into an FDIC-insured "Preferred Savings Account" (with higher interest) and (b) "shop" widely for FDIC-insured CDs with nationally competitive interest rates.

A Tribute to William Stallman

H. F. Williamson

William Stallman, a long-time member of the leadership of the UIUC Chapter of the State Universities Annuitants Association (SUAA), passed away on September 28, 2022.



William Stallman (1927-2022)

Bill started at the University of Illinois as a student after serving in the U.S. Navy during World War II. He graduated with a degree in engineering in 1950. He worked for the University of Illinois for many years and was the Director of the Office of Space Utilization when he retired.

We knew him best as a colleague on the UIUC SUAA Chapter's Executive Committee. He was member of that Committee during the 1990s and served as Chapter President for the 1995-1996 and 1996-97 terms. His tenure including leading the Chapter's successful hosting of the Big 10 Retirees Association Annual meeting.

He continued to attend the meetings of the Executive Committee to provide senior leadership and serve as a mentor and friend to the over 50 individuals who served with him on the Committee during that period. This included playing a vital role on the planning group for the next time we hosted the Retirees Association in 2008.

Bill was also active at the state level both as an advisor to the SUAA Executive Director and as a member of the Executive Committee of the SUAA Foundation. I had the honor of working with him closely in many of these endeavors. He was an intelligent, thoughtful colleague with a positive outlook and good sense of humor.

We will miss Bill Stallman and salute him for a life well lived and contributions made.

Faculty/Staff Assistance and Well-Being Services (FSAWS)

The services of this University of Illinois Human Resources office are available free of charge for retirees, employees, and members of their households. Services include assessments, short-term counseling, crisis services, and referrals to appropriate resources.

FSAWS also coordinates the Faculty/Staff Emergency Fund for employees in a financial crisis. Retirees are not eligible to receive FSAWS emergency funds; retirees in need can apply to the SUAA Foundation (see page 7) for assistance. However, anyone can support the FSAWS program either by mailing a

personal check (indicate Faculty and Staff Emergency Fund in memo line) to: University of Illinois Foundation, 1305 West Green Street, MC-386 Urbana, IL 61801 or with a designated gift made via <https://giving.illinois.edu>.

FSAWS is located at 1011 West Springfield, Urbana. Appointments are strongly encouraged; phone (217) 244-5312 for an appointment. For more information, visit their website:

<https://humanresources.illinois.edu/FSAWS>

Tell us what you think!

We'd like your help in directing the efforts of our local chapter and have posted a short survey online with a link from our home page at www.suaa-ui.org. If you do not have access to the internet, you can complete the printed survey here, tear this page out, and mail it back to us at

SUAA-UIUC
364 Henry MC 346
506 S. Wright Street
Urbana, IL 61801-3689

1. How often do you attend SUAA-UIUC meetings? (Select one)

- ☐ Always try to attend
☐ Occasionally
☐ Never

If you attend SUAA-UIUC meetings, what day/time of the week works best for you?

(Select all that work for you)

- ☐ Weekday evenings
☐ Saturday afternoons
☐ Sunday afternoons

2. How close to UIUC do you live?

- ☐ Within 30 miles ☐ 31-60 miles ☐ 61-120 miles ☐ More than 120 miles

3. Are you an Illinois resident? ☐ Y ☐ N

4. Which topics interest you for a SUAA-UIUC meeting? (Circle one number for each topic)

	Not Interested	-----	Very Interested		
Legislative proposals related to pensions & benefits	1	2	3	4	5
Active living in retirement	1	2	3	4	5
Financial planning for retirement	1	2	3	4	5
Health of the SURS pension system	1	2	3	4	5
Information on benefits choices	1	2	3	4	5
Current campus issues or updates	1	2	3	4	5
Lectures from popular professors	1	2	3	4	5
Internet safety, avoiding scams targeting the elderly	1	2	3	4	5
Estate planning, wills, trusts	1	2	3	4	5
Tax planning	1	2	3	4	5

Other suggestions? _____

5. How interested would you be in participating in social activities organized by SUAA-UIUC?

(Circle one for each option)

	Not Interested	-----	Very Interested		
Bus trips to Chicago or Indianapolis for concerts, shows	1	2	3	4	5
Bus trips to Chicago/Indianapolis/Springfield museums	1	2	3	4	5
Football tailgating	1	2	3	4	5
Picnics	1	2	3	4	5
Guided hikes through nearby nature preserves or parks	1	2	3	4	5
Block of tickets for shows/events at Krannert Center, State Farm Center, or Virginia Theatre	1	2	3	4	5
Tours through University facilities e.g. Krannert Center, Krannert Art Museum, Bee Pollinatorium, Observatory, Spurlock Museum, Japan House, Arboretum	1	2	3	4	5

Other suggestions for social activities: _____

6. Do you have any suggestions for how SUAA-UIUC can improve its service to you?

7. Are you (or your spouse)

___ receiving a pension ___ left UI, but not yet receiving a pension ___ still employed by UI

8. Are you now or will you be eligible for Medicare at some point? ___ Yes ___ No

9. Which retirement plan are you (or your spouse) enrolled in?

___ Traditional ___ Traditional portable ___ Retirement savings plan (formerly called "Self-managed plan")

10. Did you begin your SURS participation on or after Jan. 1, 2011? ___ Yes ___ No

(This is sometimes called "Track 2", which limits pensions somewhat)

Thank you for taking the time to answer this survey!

In Memoriam

Marissa Brewer

Below is the name of each SURS participant from the Urbana-Champaign campus and allied agencies who passed away between July 1, 2022 and December 30, 2022. Source: Freedom of Information Act request from SURS, which no longer provides the age and date of death.

Adcock, Ruth A.	Edwards, Murle	Kolodziej, Antje H.	Richards, Larry Carl
Agans, Geraldine L.	Ellis, Dolores R.	Lancaster, Lella R.	Rohr, James A.
Albers, Daniel J.	Elmore, Roger David	Lansing, Kenneth M.	Rost, Larry D.
Amico, Robert L.	Elsass, Alan E.	Larson, Richard A.	Rothman, Neal J.
Atkin, J. Myron	Emanuel, Tom W.	Lesoway, Maryna	Sammons, Donald G.
Atwater, David F.	Fenton, Ruby M.	Ludolph, Cathleen E.	Sapir, Mark
Backy, Fote E.	Finder, Verna L.	Luyando, Nelson	Sauer, Peter William
Balluffi, Robert W.	Fiscus, James J.	Lybarger, Shannon R.	Scoville, James G.
Barnhart, Theodore G.	Flanagin, Timothy A.	Marks, Jackie L.	Seitz, Richard George
Bastion, Jared E.	Fortier, Priscilla J.	Marquart, John R.	Siewert, Bernard C.
Becker, Madelle R.	Foster, Marvin Wayne	Martin, Ruby Darlene	Skinner, Avis M.
Beeth, Daryl A.	Frauenfelder, Hans	Marvin, Howard W.	Slocum, Clyde W.
Benfield, Marion W.	Gaines, Frank V.	Mathis, Betty L.	Smith, Jimmie H.
Benner, William E.	Gangloff, Gaylord R.	Mattson, David Albin	Spaulding, Kathleen S.
Bidner, Gary L.	Green, Homer J.	Mays, Etta M.	Spitz, Charles S.
Black, Patricia H.	Greene, Joseph E.	McBeath, Ilanda F.	Stallman, William E.
Bonner, June D.	Greenwood, Pattie J.	McFarland, Rand R.	Stewart, Charmian N.
Bremer, Brian E.	Grider, Dorothea M.	McKay, John P.	Swanson, Marcella E.
Brown, Robert C.	Grunau, John A.	Messer, Kyle T.	Thompson, Donna W. F.
Buening, Jeffrey D.	Haile, Harry Gerald	Metze, Gernot A.	Vaughn, Clara Marie
Buening, Vernon G.	Haken, Wolfgang R. G.	Miller, George S.	Vevera, Melvin L.
Bunch, Dorothy J.	Harris, Ora Fred	Miller, Joseph A.	Wajenberg, Arnold S.
Burdge, Rabel J.	Harvey, Beverley A.	Mills, Lita Jean	Wajenberg, Joyce E.
Burr, Dorothy J.	Henderson, Kathryn L.	Moody, Marilyn K.	Waldrop, Tony Gerald
Byers, David L.	Herriott, M. Berniece	Moody, Ronald D.	Ward, Christopher W.
Calder, William M.	Hilpipre, Ronald A.	Nichols, Lillian M.	Warnecke, Richard B.
Cameron, Michael J.	Hinton, Royce A.	Nordstrom, Judith L.	Weisbenner, Scott J.
Carter, Estil N.	Holonyak, Nick	Novak, Robert J.	Wetzel, Rebecca S.
Cherrington, Virginia L.	Hrnjak, Predrag S.	Ochoa, Lisa Murphy	Williams, Dorothy W.
Craig, Paul R.	Hurley, Joyce C.	Offutt, Lisa K.	Williamson, Lisa K.
Crow, Brian A.	Iversen, J Terry	Palmer, Frank W.	Wilson, Richard H.
David, Yvonne Marie	Johnson, John M.	Parrett, Douglas F.	Winfrey, Michele R.
Davis, Sharon E.	Jordan, Laura J.	Patterson, Pamela S.	Winkelmann, Betsy R.
Delaney, Jeri L.	Kaiser, Clarence J.	Plath, David W.	Withers, Joan J.
Devall, Karen L.	Kaler, James B.	Polson, Sherry L.	Wood, Fran C.
Diel, Carma J.	Kao, Tsung Chung	Pope, John S.	Woodhouse, John B.
Dixon, Paul E.	Kendrick, Jeffrey	Rahman, Matiur	Woods, Ernest
Doane, Stephanie M.	Kesler, Evelyn M.	Ray, Daniel L.	Woodward, Donald E.
Donaldson, Joseph F.	Klein, Miles Vincent	Rich, Robert Frank	Yonan, William J.
			Yore, Douglas A.

**University of Illinois at Urbana-Champaign
SUAA-UIUC Chapter
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Urbana, IL 61801-3689**

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