

STATE OF CONNECTICUT

STATE EMPLOYEES' RETIREMENT COMMISSION

PURCHASE OF SERVICE AND RELATED MATTERS SUBCOMMITTEE

DATE: July 21, 2026

LOCATION: VIA ZOOM

Present:

Peter Adomeit, Chairman

Trustee Michael Carey

Trustee Carl Chisem

Trustee John Disette

Others present:

Robert Helfand, Retirement Services Division Assistant
Director

Ben Sedrowski, Retirement Services Division Planning
Specialist

Kimberly Winter, General Counsel, Rose Kallor

1 (Proceedings began at 9:04 a.m.)

2

3 KIMBERLY WINTER: I can read attendance, Peter,
4 if you'd like.

5 PETER ADOMEIT: Do you have the attendance,
6 please?

7 KIMBERLY WINTER: Yes. So, in attendance we
8 have Chairman Peter Adomeit, Trustee Michael Carey,
9 Trustee Carl Chisem, Trustee John Disette, Robert Helfand
10 and Benjamin Sedrowski, and myself, Kimberly Winter,
11 filling in for Attorney Cieslak.

12 PETER ADOMEIT: Thank you, Kimberly. Okay, may
13 we please have a motion to approve the agenda?

14 MICHAEL CAREY: Mr. Chairman, this is Mike
15 Carey. I move to approve the agenda for today's meeting.

16 JOHN DISETTE: Second.

17 PETER ADOMEIT: Okay. All in favor, say aye or
18 raise your hand. Opposed nay or raise your hand. It's
19 unanimous. The ayes have it.

20 New Business. A. Andrew Black.

21 BEN SEDROWSKI: Okay. Good morning, everyone.
22 Mr. Andrew Black is at page three of your packet. He is
23 requesting that the Commission permit him to purchase his
24 prior military service past the one year deadline that is
25 associated based on 5-180b.

1 He does this with a basis stating that he was
2 not informed of his purchase rights at any point during
3 his initial onboarding and employment with the Norwalk
4 Community College, nor was he informed of those purchase
5 rights following that when he transferred to the
6 Department of Aging and Disability Services.

7 Mr. Black was first hired at Norwalk Community
8 College, effective 1/27/2023. Following that date of
9 hire, he did become a member of the SERS Tier IV hybrid
10 plan. He then continued in that employment until October
11 of that year, at which point he then transferred to the
12 Department of Aging and Disability Services.

13 At that time, he was transferred to standard
14 SERS Tier IV, and by letter dated in 2025, Mr. Black then
15 later submitted an application to purchase his military
16 service. RSD then responded later that month
17 administratively denying that as untimely being past the
18 one year deadline associated.

19 As stated, he began and commenced State service
20 in 2023, January 2023, but did not submit his application
21 until December of 2025, so he was past that deadline, and
22 as we know, the Commission has authorized and waived that
23 deadline in cases where agency error has risen to
24 essentially extenuating circumstances that would warrant
25 tolling of that deadline.

1 In this case, Mr. Black has asserted that the
2 agency did not provide any kind of information regarding
3 that. Both his originating agency as well as his
4 transfer agency have confirmed essentially that the
5 record does not reflect any kind of documentation that
6 was provided to him. Both actually have conflicting
7 interpret -- had conflicting interpretations and
8 procedures in regards to who was to receive purchase
9 forms. For example, Norwalk Community College
10 specifically stated that the only employees that would be
11 given purchase forms were rehires. And in regards to
12 that, they submitted a cover letter that they use or a
13 cover sheet that they use as a sign off when somebody is
14 first being onboarded, and that is consistent with that
15 where it states that the purchase forms are only
16 available under the rehire category.

17 On the flip side of that, the ADS, on the other
18 hand, only provided purchase forms to new hires for that
19 attestation at the bottom of it to provide that informed
20 consent regarding the military purchases. So at the time
21 when he transferred into ADS, he was marked as a transfer
22 and therefore did not receive the purchase forms
23 according to their staff -- or procedures. And prior to
24 that, because he was coming in as a new hire, he did not
25 receive the forms according to all Norwalk Community

1 College's procedures.

2 Both of the agencies have been advised by RSD
3 that each and every hire event requires that CO-800 to be
4 completed because of this ongoing issue in regards to
5 informed consent, particularly related to deadlines,
6 however, as it stands currently, his application was
7 outside that deadline, so we have administratively denied
8 it at this point.

9 MICHAEL CAREY: And did he -- this is Mike.
10 Did he provide any indications to how he became aware
11 that he could purchase that service?

12 BEN SEDROWSKI: Let me check. I don't believe
13 he specified how he became aware of it.

14 JOHN DISETTE: Mike, by that question, are you
15 indicating you -- you think you -- are you feeling like
16 you want to uphold the denial?

17 MICHAEL CAREY: I'm just wondering if he -- if
18 for some reason there's information in there that said,
19 Oh, well, yeah, I had -- I was going back through my
20 paperwork and saw that I could -- or something like that.
21 But I mean, to me, it put both agencies on notice that
22 they have to change their procedures, which kind of
23 suggests to me that --

24 JOHN DISETTE: Agency error. Yeah.

25 MICHAEL CAREY: Yes, that's my thought on that.

1 John, how about you?

2 JOHN DISETTE: I'm with you. Yeah.

3 BEN SEDROWSKI: I will state in both his
4 purchase applications -- so he did submit a letter
5 alongside with that initial application on top of the
6 appeal. And he says that, "I understand the one year
7 application period has lapsed," but he doesn't specify
8 what made him aware of it. He just cites that he wasn't
9 made aware of it at the time of his hiring, and then both
10 agencies have confirmed to at least an extent he didn't
11 receive any kind of form that would have guaranteed his
12 conform -- or informed consent in that regard to them.

13 MICHAEL CAREY: Do we do these as we go along?

14 BEN SEDROWSKI: I believe traditionally we do.

15 MICHAEL CAREY: Mr. Chairman, this is Mike
16 Carey. Given the fact pattern in the Black case, I would
17 move that we approve his request to be eligible to
18 purchase his military service.

19 JOHN DISETTE: We're doing a recommendation to
20 approve, right?

21 MICHAEL CAREY: Well, we will, yes. We're
22 recommending to the Commission that he be allowed to do
23 that.

24 JOHN DISETTE: Yep. All right, I'll second
25 that.

1 PETER ADOMEIT: Okay. Any further discussion?
2 All in favor, say aye or raise your hand.

3 MICHAEL CAREY: Aye.

4 PETER ADOMEIT: Opposed nay or raise your hand.
5 It's unanimous. The ayes have it.

6 Okay. James Donohue.

7 BEN SEDROWSKI: Okay. Mr. James Donohue is at
8 page 22 of your packet.

9 Mr. Donohue is also requesting that the
10 Commission permit him to toll the one year deadline
11 associated with his prior military service purchase.

12 Mr. Donohue was first hired at the Office of
13 the Attorney General back in 2019, where he became a
14 member of the SERS Tier IV plan. At that time, he did
15 not submit an application to purchase his military
16 service, however, the agency did confirm that in his
17 record there was a copy of the purchase forms that were
18 given to him, but they were not returned pursuant to his
19 HR.

20 Following that, on April 21, 2026, Mr. Donohue
21 applied to purchase his prior military service to RSD,
22 RSD then responded, administratively denying that as
23 untimely by letter in May. And then Mr. Donohue
24 submitted this appeal.

25 As in the previous case, this is a situation

1 where the individual was past the one year deadline.
2 Here, Mr. Donohue particularly cites circumstances around
3 his personal life and taking care of family members, as
4 well as the COVID pandemic that happened shortly
5 thereafter his hiring as things that may have contributed
6 to it. However, in his own documents, he does concede
7 that the purchase forms were at least, I will use his
8 particular words, "likely would have been included", or
9 that his "original onboarding forms would have likely
10 included the process for purchasing retirement credits
11 for prior military service."

12 So, counter -- or in contrast to the prior case
13 here, the agency has confirmed that at least the purchase
14 forms were given to the employee, however, we were not
15 receipt -- we did not receive them back.

16 MICHAEL CAREY: So, this is Mike Carey. This
17 particular situation is different from the previous. I
18 think that the fact pattern in this case does not support
19 granting of the appeal. I'm wondering what my colleagues
20 think.

21 JOHN DISETTE: I would agree.

22 CARL CHISEM: Yeah, I would too.

23 MICHAEL CAREY: So then, Mr. Chairman, this is
24 Mike Carey. The Donohue matter, I move that the
25 Subcommittee recommend to the Commission that they deny

1 Mr. Donohue's appeal.

2 JOHN DISETTE: I'll second.

3 PETER ADOMEIT: Any further discussion?

4 Hearing none, all in favor say aye or raise your hand.

5 MICHAEL CAREY: Aye.

6 PETER ADOMEIT: Opposed nay or raise your hand.

7 It's unanimous. The ayes have it.

8 Whitney Easton.

9 BEN SEDROWSKI: Okay. Mr. Whitney Easton is at
10 page 31 of your packet.

11 Whitney Easton has requested that the
12 Retirement Commission permit him to make a new retirement
13 plan election to the Alternate Retirement Program in lieu
14 of his prior irrevocable election to waive retirement
15 plan membership, citing his participation in ARP -- for
16 his continued participation in ARP from 2021 to 2025 as a
17 primary concern for why the refund should be reinstated
18 and he should be allowed to participate in ARP.

19 Mr. Easton was first hired as a part-time
20 lecturer on August 27, 2010. At that time, he elected to
21 waive retirement plan membership. Later on in 2017, in
22 August, Mr. Easton was rehired as a PTL and attempted to
23 elect SERS Tier III. During this period, Mr. Easton was
24 erroneously placed in Tier III from pay period ending
25 9/14/2017 until March of 2018. That error has been

1 corrected and has been refunded in full by our Member
2 Accounts Unit back in May of 2022.

3 However, in 2021, following that employment,
4 Mr. Easton was rehired as PTL and elected to participate
5 in the Alternate Retirement Program. At that point, his
6 agency did place him into ARP and did not abide by the
7 prior waiver being an irrevocable election for future
8 employment. That participation in ARP then continued
9 from 2021 until 2025 when it was identified by RSD and
10 RSD instructed the agency to close any deductions that
11 were on part-time employment due to the irrevocable
12 waiver that was taken in 2010.

13 Of note, additionally, in 2024, following the
14 election to participate in ARP and the election to
15 participate in Tier III, Mr. Easton was rehired as a PTL
16 again in concurrent employment and elected to waive
17 membership.

18 As I stated, following the identification, all
19 of these were closed in the fall of 2025 and then Mr.
20 Easton then submitted this appeal to SERC following that.

21 In particular, this was the result of a waiver
22 that was done in 2010. As we know, part-time lecturers
23 across the state and adjunct faculty at UConn are able to
24 waive retirement plan membership. However, they are only
25 able to do so on a one-time irrevocable basis.

1 In the case of that, that then applies to all
2 future part-time employment within the higher education
3 system and that is then binding on all part-time
4 employment in that regard.

5 In the event that Mr. Easton will attain full-
6 time employment, then he would be required to make a
7 retirement plan election. However, that election and
8 that participation would only carry forward in that full-
9 time position and the waiver would still remain for the
10 part-time.

11 So, as it stands currently, he was issued a
12 refund for the amounts from this period that included the
13 employee contributions and the actual gains on those
14 employee contributions from the ARP plan. However, he
15 was not refunded the employer contributions or gains on
16 those funds. And Bert, if you have anything further to
17 add from that from the Miscellaneous Unit, please feel
18 free to add that in for the refund portion.

19 MICHAEL CAREY: So, Ben, this is Mike. So, he
20 waived back in 2010, and if I'm hearing this correctly,
21 in 2024, offering him the opportunity would have been
22 improper because he had already waived and yet he was
23 offered and he waived again.

24 BEN SEDROWSKI: So, that is correct in
25 accordance with the CO-931, so, the election forms. So,

1 if you turn to Exhibit E on page 41 of your packet,
2 that's that 2024 waiver. So, I cannot speak to, you
3 know, the actual discussion that was had between the HR
4 personnel and that. However, it is very clearly elected
5 as a waiver at that point and there are no comments, you
6 know, to notate that it was a default or that it was
7 because of the prior election.

8 I think this one is of particular note due to
9 the prior ARP and SERS elections as well. So, it's, you
10 know, it's inconsistent in the elections across the
11 record.

12 JOHN DISETTE: So, at what point did he get
13 employment where he's seeking it, seeking the plan?

14 BEN SEDROWSKI: August 25, 2017 is the first
15 election for a retirement plan, but that is SERS. So,
16 and again, would have been, you know, improper based on
17 that. However, the first election to ARP is August 27,
18 2021.

19 BEN SEDROWSKI: There is -- so, looking at the
20 employment record, there is also a special payroll time,
21 I believe that's sprinkled in between there as well.
22 That makes the records look even more convoluted where
23 there's like periods of ineligible employment. There was
24 also graduate assistant time that predated the eligible
25 employment as well, if I'm not mistaken. So, in both of

1 those circumstances, you know, the record, you know, also
2 reflects periods of ineligibility on top of the waivers,
3 which I believe, you know, definitely compounded to add
4 to that erroneous SERS election back in 2017 to begin
5 with. And that, you know, follows that to the ARP
6 election in 2021.

7 MICHAEL CAREY: And there must have been a
8 separation between '21 and '24 if in August 24 he's
9 rehired. Right?

10 BEN SEDROWSKI: Yes, I believe that -- here I
11 can -- he had multiple records, so, let me bring back up
12 my notes. We had set up job records.

13 But, yes, as a PTL on a part -- so, he's a
14 part-time lecturer at Eastern as well as community
15 colleges. Those are contractual where they are
16 terminated and rehired and terminated and rehired in the
17 system. So, at multiple of those events is when those
18 CO-931s were taken.

19 MICHAEL CAREY: I appreciate that the coming in
20 and out can be confusing, but I'm not really seeing how
21 we can grant his request considering that there have been
22 multiple waivers in the record, starting with the very
23 first one.

24 JOHN DISETTE: Ben, I'm just curious, was there
25 any time that he was legitimately placed in a retirement

1 plan?

2 BEN SEDROWSKI: I would say no, based on the
3 irrevocable waiver in the very beginning. So, looking at
4 the job records, there are multiple periods, especially
5 early on from the early coding that was converted over to
6 CORE where it shows as if he was a full-time lecturer.
7 There's support in the record that the agency confirmed
8 that he was a PTL during that entire time. So, that
9 initial waiver in 2010 was valid and is so long as he
10 remains as a part-time employee throughout all of his
11 employment, which apparently appears to be the case
12 according to the agency as well as the record, that
13 waiver would continue to apply throughout that. So, any
14 subsequent employment that does not rise to anything to a
15 full-time equivalent of one would require him to remain
16 waived.

17 MICHAEL CAREY: This is Mike Carey. The
18 Subcommittee recommends to the full Commission that they
19 deny Mr. Easton's request.

20 JOHN DISETTE: John Disette, I'll second.

21 PETER ADOMEIT: Any further discussion?
22 Hearing none, all in favor say aye or raise your hand.
23 Opposed nay or raise your hand. It's unanimous, the ayes
24 have it.

25 Michael Edewich.

1 BEN SEDROWSKI: Okay. All right. Mr. Edelwich
2 is on page 42 of your packet.

3 Mr. Edelwich, which is a member of SERS Tier
4 IIa, who is requesting the Retirement Commission permit
5 him to purchase his prior service that he originally
6 rendered under Tier I in the 80s.

7 Mr. Edelwich was first hired by the State in
8 April of 1984, at which time he became a member of Tier
9 I. Later on he then separated from state service in
10 1987. In 1988 he applied for and received a refund of
11 his Tier I contributions and interest and then was
12 separated from state service until 2007, at which time he
13 was rehired due to incurring a permanent break in service
14 and the refund.

15 Mr. Edelwich was properly placed into SERS Tier
16 IIa at that time and at that time he did submit a request
17 to purchase his prior state service. RSD
18 administratively denied that, citing that there was no
19 purchase provision that allowed an individual to purchase
20 time in a prior tier and then Mr. Edelwich continued his
21 career.

22 In 2020, Mr. Edelwich submitted an additional
23 request to purchase that prior Tier I service. RSD then
24 responded and administratively denied that again by
25 letter in January of 2021.

1 Following that, in 2024 Mr. Edelwich submitted
2 an additional request to purchase it and then in August
3 of 2024, RSD administratively denied it one more time.

4 And then following emails with RSD this year,
5 Mr. Edelwich did submit this appeal along with the
6 additional request to purchase that service that you see
7 in Exhibit A.

8 Specifically, of note in this case is that SERS
9 Tier IIa and SEBAC V does not provide for the restoration
10 or purchase of service credit that is prior to a
11 permanent break in service, and especially in cases where
12 there has been a prior refund, the individual that has
13 taken that refund, you know, forfeits all rights and
14 benefits under that plan unless they return within that
15 five year period or their prior vesting service,
16 whichever is greater.

17 Mr. Edelwich separated prior to vesting and
18 then took that refund and was rehired in 2007. So, we
19 have approximately a 20 year gap between the two. As
20 such, he was properly placed in 2A upon his return.

21 Because of this and there not being any
22 permissive service purchase that fits within this, RSD
23 has administratively denied it.

24 JOHN DISETTE: I share his regret for not
25 staying, sticking it out with Tier I.

1 Ben, if we let this go and we let him purchase
2 that, can I do the same?

3 BEN SEDROWSKI: Only if we make student work
4 time also available.

5 MICHAEL CAREY: Just as a side note, I'm
6 curious. Is he actually -- is he looking to have it
7 credited toward his Tier II or is he actually looking to
8 rejoin Tier I?

9 BEN SEDROWSKI: So, he has used restoration as
10 well as additional service in his appeal, if I'm not
11 mistaken, kind of interchangeably. My understanding is
12 that he wishes to purchase it essentially as
13 miscellaneous service time under Tier IIa. He's not
14 seeking a tier transfer and retroactive placement to Tier
15 1b.

16 MICHAEL CAREY: One way or another, I'm not
17 seeing any way that we can do that. So, Ben, I would
18 move that the Subcommittee recommend to the full
19 Commission that they deny Mr. Edelwich's requests.

20 CARL CHISEM: Second.

21 PETER ADOMEIT: All in favor, say aye or raise
22 your hand. Opposed nay or raise your hand. It's
23 unanimous. The ayes have it.

24 Richard Gerena.

25 BEN SEDROWSKI: Okay. There is no memo

1 currently in your packet for Richard Gerena. He is a
2 additional request to waive the one year deadline
3 associated with a 5-180b military purchase. However, I
4 am pending further information from the agency as well as
5 ourself regarding the purchase. I just wanted to flag it
6 for yourself that we've received an appeal from the
7 individual. However, I would request that the
8 Subcommittee tables it to the next meeting to be
9 addressed.

10 MICHAEL CAREY: Mr. Chairman, this is Mike
11 Carey. So moved to table the Gerena matter till our next
12 meeting.

13 JOHN DISETTE: Oh, I'll second.

14 PETER ADOMEIT: Okay. All in favor, say aye or
15 raise your hand. Opposed nay or raise your hand. It's
16 unanimous.

17 Okay. William Luchon. Okay.

18 BEN SEDROWSKI: Mr. William Luchon is at page
19 65 of your packet.

20 This individual has requested that the
21 Retirement Commission permit him to make a new retirement
22 plan election to the Alternate Retirement Program at the
23 5% contribution rate in lieu of his prior election to the
24 ARP 6.5% contribution rate.

25 He does this citing that he was only employed

1 at that prior position where he made that election for a
2 month and deductions were not actually taken at the time
3 of his hire prior to his separation from service.

4 Regarding that prior hire, Mr. Luchon was first
5 hired into a retirement eligible position effective March
6 7, 2022. At that time, he elected to participate in the
7 ARP 6.5% retirement plan. However, despite this
8 election, no retirement deductions were opened by the
9 agency prior to his separation from service, which did
10 take place on April 7, 2022.

11 October 31, 2025, Mr. Luchon was rehired into
12 an eligible or into eligible employment where he elected
13 ARP 5%. ARP 5% deductions did then begin at that time.

14 Following identification of the placement
15 error, RSD directed the agency to correct the retirement
16 plan deductions to ARP 6.5 to be effective in pay period
17 ending January 22, 2026. Mr. Luchon then submitted this
18 appeal to SERC.

19 So, similar to the prior discussions on
20 irrevocable elections, Mr. Luchon made an election to ARP
21 6.5 back in 2022. That form is attached in your
22 exhibits. However, of note, he is correct in the sense
23 that the agency did not open any contributions at that
24 time, so he did not become a member of that plan by
25 remitting contributions. This is analogous in a similar

1 way to the agency error, at least to a prior Commission
2 action, Anna Michonne (phonetic) where the agency failed
3 to open those deductions for ARP. However, in that
4 instance it was the case of a default, so that didn't
5 actually have an affirmative election from the member to
6 that retirement plan where that is a differing fact in
7 this case.

8 In Anna Michonne, the Commission did permit
9 that new retirement plan election to waive membership.
10 However, again, in that instance there was no prior
11 election and there had been no contributions remitted.
12 In this instance, the employee did actually elect to
13 6.5%, however, the agency failed to open the
14 contributions prior to that separation.

15 As it stands, however, because that would be
16 considered a new plan election, RSD has administratively
17 denied Mr. Luchon's request to make that new election at
18 5%.

19 MICHAEL CAREY: So Ben, is the agency -- is
20 there agency error in this case and they're having
21 afforded him the opportunity to make an election upon
22 rehire in October of '25.

23 BEN SEDROWSKI: Assuming, so -- yes. Assuming
24 that the election in 2022 is valid and, you know,
25 binding, which would be the question -- or essentially

1 what he is arguing is that one shouldn't be binding in
2 this instance because he didn't remit those
3 contributions. So, the agency error of not opening the
4 deductions for your initial election is one category, and
5 then you could consider agency error of allowing for a
6 second election upon rehire. Yes, you could.

7 MICHAEL CAREY: To me it's definitely the
8 agency erred not commencing those deductions. But
9 there's no agency error where I could see. There wasn't
10 agency error in that contributed to his having made the
11 underlying decision. Right? So his decision in '22 was
12 to join the 6.5% plan. Right? The agency didn't deduct,
13 but that doesn't change the fact that he made that
14 selection in my mind. So, again, I think -- I would
15 appreciate that it would be confusing for him coming back
16 into service that he's being offered something again, but
17 I don't think that that negates the original selection
18 that was made upon initial hire.

19 JOHN DISETTE: And haven't we had similar,
20 right? Like people, like, three, four days later, say,
21 oops, I want something else. And we say, no.

22 MICHAEL CAREY: Yeah.

23 JOHN DISETTE: You know, the black cherry --
24 the Polar black cherry seltzer, is really good, Mike.
25 Have you tried that one?

1 MICHAEL CAREY: So this one is orange vanilla.
2 My son-in-law refers to cherry -- black cherry as penance
3 seltzer. He only drinks that if he's -- if he's been bad
4 and he has to, you know, do penance.

5 JOHN DISETTE: I think -- I think that's why
6 I'm accustomed to that flavor, Mike. So that's like a
7 Creamsicle then, right? Orange and vanilla?

8 MICHAEL CAREY: Yeah, it's delicious. I really
9 like it. In any event, regarding this particular case --

10 PETER ADOMEIT: Hey, Michael. What -- what is
11 it? I want it. What are you drinking?

12 MICHAEL CAREY: This is orange -- orange
13 vanilla. It's Polar.

14 PETER ADOMEIT: Polar.

15 MICHAEL CAREY: Polar brand orange vanilla.
16 So, yeah, it tastes like a Creamsicle. Not sweet at all,
17 but it's got that lovely --

18 PETER ADOMEIT: Orange vanilla. Thank you.

19 MICHAEL CAREY: You're welcome. Back to the
20 matter at hand in the Luchon case that we recommend to
21 the full Commission that based on this fact pattern that
22 they deny Mr. Luchon's request.

23 MICHAEL CAREY: I'll second that.

24 PETER ADOMEIT: Any further discussion?
25 Hearing none, all in favor say aye or raise your hand.

1 Opposed nay or raise your hand. It's unanimous. The
2 ayes have it.

3 Kally Moquete-Gonzalez.

4 BEN SEDROWSKI: Okay. Ms. Moquete-Gonzalez is
5 at page 79 of your packet.

6 Ms. Moquete-Gonzalez has requested the
7 Commission permit her to return to SERS Tier III
8 following her default or, sorry, following her current
9 placement in SERS Tier IV following a permanent break in
10 service.

11 She has provided a number of arguments in
12 regards to basis for that and those have been provided on
13 your brief there and can be seen as well as in Exhibit A
14 of hers. I will allow her to speak for herself in that
15 regard.

16 Ms. Moquete was first hired into eligible
17 service effective October 17, 2014. At that time she did
18 become a member of SERS Tier III. She then continued
19 employment until May 18, 2018, at which point she then
20 separated from state service.

21 As of that date, Ms. Moquete-Gonzalez had not
22 vested a Tier III benefit, so that then renders her still
23 beholden to the permanent break provisions in that
24 regard, which is she must return with within either five
25 years or the amount of her prior service, prior to

1 leaving, whichever is greater.

2 Ms. Gonzalez was then separated -- Moquete-
3 Gonzalez was separated from state service until she was
4 rehired in April of 2026. At that time she had incurred
5 a permanent break in service as she had been gone for
6 approximately seven years and 10 months, which was
7 greater for both of those amount of times.

8 However, upon rehire she was mistakenly placed
9 back into SERS Tier III for her first pay period. That
10 was a result of the Tier III contribution still being
11 open in that job record. Following identification of
12 that deduction error, however, in that first pay period,
13 RSD instructed the employing agency to correct tier
14 placement from Tier III to IV based upon the permanent
15 break and that change became effective at pay period
16 April 30, 2026. Following that tier correction, Ms.
17 Moquete-Gonzalez submitted this appeal to SERC.

18 In regards to this, this is actually a similar
19 request that we recently saw to Marisol Salomon
20 (phonetic) in which case she had returned following a
21 permanent break in service and requested to return to
22 Tier III as well. I will note that the Commission did
23 deny that in that instance as well.

24 Ms. Moquete further makes a number of
25 additional arguments. One in particular is that she had

1 left her money in the SERS Tier III plan following her
2 separation and before her rehire. However, that being
3 said, that does not set aside the permanent break
4 provisions as is current and has been consistent policy
5 with RSD and through SERS, the multiple tiers, and I will
6 also note that in accordance with SEBAC V, following the
7 permanent break in service, SERS members are conclusively
8 presumed to have applied to refund those contributions
9 and interest once they have incurred that permanent break
10 in service.

11 Turning to agency error, Ms. Moquete-Gonzalez
12 has also argued that representations made by her agency
13 prior to her separation as well as her placement in Tier
14 III that I mentioned prior, you know, following her
15 rehire, support her replacement into Tier III opposed to
16 Tier IV. I will note that there is no historic precedent
17 that I found from the Commission for setting aside the
18 permanent break provisions due to such an error, and I
19 would also say that it should be noted that permanent
20 break provisions explicitly provided in the Tier III
21 Summary Plan Description and they have been throughout
22 the entirety of that tier since its initial publishing.

23 One last note I will make before questions;
24 following the last Subcommittee meeting as well, Ms.
25 Moquete-Gonzalez submitted an additional supplement sole

1 submission with some argument in support of her claim.
2 To that point, she wanted to direct the Commission's
3 attention to prior cases where a new retirement plan
4 election has been permitted due to agency error,
5 particularly in relation to official communications. To
6 that end, she cites a case in which an employee received
7 onboarding documents that misrepresented the percentage
8 that would be deducted for a SERS plan for 3% compared to
9 Tier IV as we know it for 6% between the DB and the DC to
10 where the Commission had ruled that that was such a
11 significant departure from the truth that that
12 constituted an agency error that would be extenuating
13 circumstances to warrant allowing a new retirement plan
14 election.

15 To that end, I will say that those cases differ
16 from Ms. Moquete-Gonzalez's case in that it is not a
17 permissive retirement plan election problem that she is
18 facing, it is a SERS -- administration of SERS plan
19 provisions in particular that is the issue. So, in the
20 prior cases of agency error, the Retirement Commission
21 was able to permit a new plan election to the Alternate
22 Retirement Plan or waive or to SERS in ARP, so on and so
23 forth, opposed to this situation where SERS is a
24 mandatory condition of her employment at her employing
25 agency and then the permanent break rules are a mandatory

1 requirement of that SERS plan.

2 For those reasons, the Retirement Services
3 Division has administratively denied her request to
4 return to Tier III and has placed this before you.

5 JOHN DISETTE: Curious question, Ben. If she
6 had returned before the five years -- five year
7 limitation from her separation was up, she'd
8 automatically be in Tier III. She wouldn't be able to
9 elect Tier IV, right?

10 BEN SEDROWSKI: That's correct.

11 JOHN DISETTE: So there really isn't much of an
12 election here anyway, right? We use the term election,
13 but for SERS dedicated units, agencies, however we term
14 it, it's not really an election, it's a, you're going
15 here.

16 BEN SEDROWSKI: That is correct. And that
17 would be my point to the difference between permitting a
18 new retirement plan election where they are making that
19 determination between ARP and SERS, where there's an
20 informed consent element to it and the individual being
21 informed of that agency is a crucial element in that to
22 this, it's an application of the rules based upon when
23 you come back and what service you had prior to you
24 leaving.

25 JOHN DISETTE: Okay, so that Tier III money is

1 still sitting out there though, right? Like she still
2 hasn't collected it.

3 BEN SEDROWSKI: That is correct. I do not
4 believe it has been refunded to date.

5 JOHN DISETTE: And she can't roll it into the
6 Tier IV, correct?

7 BEN SEDROWSKI: That is correct as well.

8 JOHN DISETTE: So she really only has one
9 option there, which is to collect that money at this
10 point, right? What else would happen to it?

11 BEN SEDROWSKI: Actually, Bert, correct me if
12 I'm wrong, but because of the permanent break, if I'm not
13 mistaken, she would be entitled to a refund of that as an
14 agency error upon the prior Commission decision from last
15 year or the year prior.

16 So, turning back to SEBAC V for that 5-193u
17 where the employee is conclusively presumed to have
18 refunded. So at that point when she came back into
19 service, I'm not sure if it would apply the same for a
20 default placement into SERS like this because the agent,
21 you know, the error of not refunding isn't necessarily
22 preventing an election like it would in the other cases -
23 - in higher ed, like we've seen.

24 ROBERT HELFAND: No, but I think -- I'm sorry,
25 I'm having some kind of coughing fit. I think your

1 analysis is correct. I mean, ultimately this is simply a
2 matter of applying the permanent break rules. And so
3 she's essentially a new employee for purposes of her
4 current placement. And that means that if she didn't
5 vest before the permanent break, then her, as was said,
6 her only option is a refund.

7 JOHN DISETTE: I wonder if she's aware of that.
8 I don't think it changes anything here, but it's just
9 curious that that money's still there and there's no
10 option but to withdraw it or send it, you know?

11 MICHAEL CAREY: Be in a situation -- does she
12 have to request that or can we instruct the Division to
13 refund her? Because that money can't stay in and she
14 should get it back.

15 BEN SEDROWSKI: So, I'm not -- off the cuff I'm
16 not 100% sure what the standard procedure is for the
17 individuals that are being identified in accordance with
18 that prior decision on if we contact them directly first
19 and then, you know, offer them a refund application so
20 they can direct it to either be rolled over or directly
21 paid to them, so to speak, or if it's something that's
22 just issued immediately, but that's something that I can
23 look into and have them follow up with her if you'd like.

24 MICHAEL CAREY: You can instruct the Division
25 to contact her to advise her that she can get those

1 funds.

2 JOHN DISETTE: And if she has a 457, we can
3 roll it into that, to the State 457, right? Would you be
4 able to do that?

5 BEN SEDROWSKI: I don't believe there'd be
6 anything preventing us from doing that. Bert, are you
7 aware or is anything flagged for you that you can think
8 of tax wise?

9 ROBERT HELFAND: No, I -- It's not a process
10 that I've ever looked into, but her contributions are pre
11 -tax dollars so I think that should be possible.

12 MICHAEL CAREY: So, maybe we'll just keep it
13 straight up and deny the request and the Division can
14 figure (indiscernible).

15 JOHN DISETTE: Was that a motion? I apologize.

16 MICHAEL CAREY: I will make that motion. I
17 will -- in the Moquete-Gonzalez case, I would recommend -
18 - this is Mike Carey, and I move that the Subcommittee
19 recommend to the Commission that they deny Ms. Moquete-
20 Gonzalez's request and also that they instruct the
21 Division to reach out to the member to discuss options
22 regarding refund of contributions made during her
23 previous period of appointment.

24 JOHN DISETTE: I will second that motion. Oh.

25 PETER ADOMEIT: Is there a second?

1 JOHN DISETTE: I'll second that.

2 PETER ADOMEIT: Okay. Any further discussion?
3 Hearing none, all in favor say aye or raise your hand.
4 Opposed nay or raise your hand. It's a unanimous. The
5 ayes have it.

6 Christopher Passehl.

7 BEN SEDROWSKI: Okay. Christopher Passehl is
8 at page 98 of your packet. This individual is another
9 situation where a prior waiver has caused a later
10 subsequent ARP election to have to be refunded due to
11 ARP, you know, being erroneously taken.

12 Mr. Passehl has particularly requested that the
13 Commission permit him to make that new election in lieu
14 of that and then cites particularly his participation in
15 ARP from 2018 to 2026. He also raises a number of other
16 arguments within his appeal and that is cited in exhibit
17 A of your package as well.

18 To the case history, Mr. Passehl was first
19 hired in state service effective August 22, 2014. At
20 that time, he did elect to waive retirement plan
21 membership. He then continued and separated from state
22 service in December of 2014 of that year.

23 He was then re-employed by the state from
24 February in 2018 through May of 2018. During that
25 period, no retirement deductions were opened in his

1 record and his record remained waived. There was no
2 separate election that was received during this time.

3 August 23, 2018. Mr. Passehl was rehired by
4 UConn and then elected to participate in the ARP. At
5 that time, retirement deductions were opened and then
6 continued until February 5th of 2026 or pay period ending
7 February 5, 2026, at which time the agency closed those
8 deductions in accordance with RSD direction as a result
9 of that 2014 waiver. May 10, 2026, Mr. Passehl then
10 submitted this appeal to SERC.

11 As with the previous case that we had
12 discussed, the prior waiver for any PTL is binding on all
13 future part time employment within higher education and
14 only instances where the individual attains full time
15 employment would they be entitled to an election and
16 participation in that plan. As such, the waiver remained
17 binding and the refund was issued in this regard and
18 similar to the prior, it was employee contributions with
19 actual gains on it. However, employer contributions were
20 remitted to the forfeiture account and not remitted to
21 the employee in this instance.

22 As it stands, because of the waiver and the
23 irrevocable election nature of it, the Retirement Service
24 Division has administratively denied the request to be
25 allowed to remain in ARP due to that subsequent erroneous

1 election.

2 MICHAEL CAREY: So, Ben, at no point in time
3 did this individual's employment status change from part
4 time lecturer to something full time even during that --

5 BEN SEDROWSKI: So, I'm -- let me. I will
6 bring up the case. I'll bring it up in CORE just to be
7 sure because I'm not sure if there was a period of full
8 time employment intermixed in there. His request was to
9 reinstate the part time refund that was given.

10 So, all job data is -- it looks like UConn
11 rows, so it isn't exactly one to one in CORE CT, so, I
12 wouldn't feel confident just off the cuff stating whether
13 or not any of the things that represented his full time
14 or part time are actually full time or part time under
15 special payroll for that instance, but I would state that
16 in the event that he did have full time employment, that
17 election would be a valid election and those
18 contributions would have remained in place and not been
19 subject to forfeiture.

20 MICHAEL CAREY: So, maybe we need to get that
21 clarified?

22 BEN SEDROWSKI: I can certainly do that.

23 MICHAEL CAREY: That would be great. So, then,
24 in this case, in the Passehl matter, I would move that
25 the Subcommittee table this particular item so that, you

1 know, research into his employment status can be
2 performed and this matter can be taken up at our next
3 meeting.

4 CARL CHISEM: Second.

5 PETER ADOMEIT: All in favor, say aye or raise
6 your hand. Yeah, it's unanimous. The ayes have it.

7 Sherri Pereira.

8 BEN SEDROWSKI: Okay. Ms. Pereira is another
9 individual that does not have a memorandum in your packet
10 currently. However, just to give awareness to the
11 Subcommittee, she is an individual who is petitioning the
12 Commission to allow for a new retirement plan election
13 from SERS to TRS. So, most likely similar to those prior
14 issues we've been dealing with between the transfer
15 between the plans due to executive agency employment in
16 contrast to higher education employment.

17 So, at this time, I request that the
18 Subcommittee would table it pending further information
19 from the employing agency as well as confirmation from
20 her status with TRB.

21 MICHAEL CAREY: This is Mike Carey. So moved.

22 JOHN DISETTE: John Disette, I'll second.

23 PETER ADOMEIT: All in favor, say aye or raise
24 your hand. Yeah, it's unanimous. The ayes have it.

25 Okay. A new page, Old Business. A. William

1 Burns.

2 BEN SEDROWSKI: William Burns, I would also
3 request that the Commission table one more time. I need
4 further clarification from the employing agency as well
5 as payroll on our side as well. So, if the Subcommittee
6 would graciously table that, it would be greatly
7 appreciated.

8 MICHAEL CAREY: (Indiscernible)

9 PETER ADOMEIT: All in favor, say aye or raise
10 your hand.

11 JOHN DISETTE: I'll second.

12 MICHAEL CAREY: You need a second.

13 PETER ADOMEIT: Yeah, I'm sorry. All in favor,
14 say aye or raise your hand. Yeah, it's unanimous.

15 Roderick Chance.

16 JOHN DISETTE: Okay.

17 BEN SEDROWSKI: Mr. Roderick Chance is back
18 before you. He was tabled at the previous Subcommittee
19 meeting. He is petitioning, similar to a prior request,
20 for a new retirement plan election to the 5% contribution
21 rate of ARP in lieu of a default election to 6.5%. He
22 cited confusion during -- regarding election dates in
23 relation to the other benefit entitlements, such as the
24 31 day window for health benefits and so on and so forth.

25 At the previous meeting, the Subcommittee

1 tabled it pending a further review from the agency
2 regarding his onboarding status and whether he was in the
3 state and in person at that time.

4 At this time, they actually had forwarded it to
5 their hiring manager for further research. So,
6 additionally, if the Subcommittee would like to weight
7 that information, that would need to be tabled as well.

8 JOHN DISETTE: Didn't we have this one before
9 or was it just one very similar.

10 BEN SEDROWSKI: So, this one was tabled in the
11 previous meeting, that is correct.

12 MICHAEL CAREY: (Indiscernible) other
13 information come in.

14 JOHN DISETTE: John Disette, I'll second.

15 PETER ADOMEIT: It's a recommendation.

16 JOHN DISETTE: Oh, I'm sorry. What's that?

17 MICHAEL CAREY: It's all good. You took it as
18 a motion. Let's treat it as such. Works for me.

19 JOHN DISETTE: All right.

20 PETER ADOMEIT: Okay. It was seconded, right?

21 MICHAEL CAREY: John did.

22 PETER ADOMEIT: Yeah, John did. No? Yeah.

23 CARL CHISEM: John did.

24 JOHN DISETTE: If I jumped -- did you want -
25 did you want to discuss it? No? Okay.

1 PETER ADOMEIT: Okay. All in favor, say aye or
2 raise your hand. Yeah. It's unanimous. The ayes have
3 it.

4 Jose Crego. Okay.

5 BEN SEDROWSKI: Mr. Crego is at page 114 of
6 your packet. This was also previously tabled. This one
7 was tabled in particular to find out whether the original
8 employing agency of Western Connecticut State University
9 had evidence of him receiving any kind of documentation
10 regarding to his purchase opportunity.

11 Western Connecticut did reach out or did
12 respond to us and confirm that they were unable to find
13 anything that suggests he was either told or not told
14 regarding the option to purchase that military time. To
15 that regard, his is another situation where, you know,
16 the RSD has advised the agency that a CO-800 is required
17 for each and every purchase event, however, with the part
18 time lecturer population it is an ongoing struggle that
19 RSD faces with these agencies to ensure that those
20 documents are properly filled to each employee on
21 onboarding. But that is the update from the last one.

22 The subsequent agency that he is employed at,
23 they did support it from the outset stating there was
24 nothing in the record showing that he had been told or
25 informed of his right to purchase that within the

1 deadline, but as it stands currently, RSD has
2 administratively denied it due to it being untimely.

3 MICHAEL CAREY: Considering this fact pattern
4 resembles a prior case that we looked at regarding Mr.
5 Black -- this is Mike Carey, and I suggest that we
6 recommend to the full Commission that they approve this
7 request.

8 JOHN DISETTE: I'll second that.

9 PETER ADOMEIT: Is there any further
10 discussion? Hearing none, all in favor say aye or raise
11 your hand. Yeah, it's unanimous. The ayes have it.

12 Number four, Amanda Kehoe.

13 BEN SEDROWSKI: Okay. Ms. Kehoe is at page 134
14 of your packet. Ms. Kehoe was tabled pending further
15 information from her agency as well. Particularly of
16 note, she raised that -- or she had raised -- Ms. Kehoe
17 had raised in her appeal and her supplemental submission
18 that she had discussed the SERS hybrid versus the SERS
19 standard with her HR and had actually originally showed
20 up to her onboarding day with a SERS form completed and
21 that HR had essentially taken that and swapped it out
22 with hybrid.

23 The crux of her argument is that she was under
24 the mistaken impression that the SERS hybrid plan was the
25 standard SERS plan, but for the fact that she was in

1 higher education it was the standard SERS plan for
2 individuals within higher education. She has cited that
3 agency error to that point.

4 The agency's response to that -- they have
5 provided that they do not recall that specifically as
6 stated by the employee and their, you know, specific
7 language has been included at the end of the memorandum
8 on page 135.

9 At this time, it has been administratively
10 denied to make that transfer from hybrid to standard SERS
11 Tier IV as an irrevocable election.

12 MICHAEL CAREY: At this point in time, Ben,
13 this is Mike. I'm not seeing where there's any clear
14 indication of agency error. Is that a fair reading?

15 BEN SEDROWSKI: I did not, or, I do not believe
16 that there is clear representation of agency error in the
17 record based on the representations of the agency as well
18 as the records. So, it would be the question between the
19 -- Ms. Kehoe's, you know, appeal request and her
20 assertions opposed to the record. But I would say that
21 there's not substantial evidence of agency error, no.

22 JOHN DISETTE: And is she claiming that the
23 form that you printed for us, Ben, where she clearly
24 chooses option three, not option one, Tier IV? Because
25 there's no mark like she hit option one and changed it.

1 Is she claiming that they had her redo the form so it's
2 nice and clean, or just that she was confused by it and
3 the agency really had nothing to do with it?

4 BEN SEDROWSKI: So, if you -- I will turn the
5 Trustees to Exhibit D on page 145 of your packet where
6 Ms. Kehoe specifically kind of states what she's talking
7 about there. To that point, she states that when she
8 arrived for her onboarding, she had printed out all
9 onboarding forms, including that election form. She
10 states that she filled out all the forms and had checked
11 the regular SERS plan at that time on that form.
12 However, at that meeting at that onboarding, she states
13 that HR noted, "when I brought that in and then I asked
14 for more information" and then following this, that form
15 was taken. She was then told to fill out a new form and
16 the original election filled form with SERS IV was taken
17 and discarded is what she represents.

18 JOHN DISETTE: And nobody else has a
19 recollection of that happening, just her?

20 BEN SEDROWSKI: So, I'm just gonna turn to the
21 agency. So, Exhibit E, the agency's response. So,
22 Janine specifically states that she does not recall Ms.
23 Kehoe expressing her expressed intent to join Tier IV
24 rather than the Tier IV hybrid plan and she does not
25 recall that. She states that she only recalls the

1 completion of a CO-931, and then she states that,
2 however, I can only confirm that the specific election
3 made on that form was the Tier IV hybrid plan. She does
4 make a point as well that she does not have -- does not
5 have any documentation indicating that Ms. Kehoe did
6 attempt to elect Tier IV at the time of the onboarding.

7 Further to the point on the counseling and
8 informed consent as well, I will state that the agency
9 made a point to specifically state that they do not
10 engage in counseling in the sense of directing
11 individuals to specific retirement plans. So, that is
12 counter to -- or that assertion would be counter to their
13 daily processes.

14 JOHN DISETTE: I'm not sure. What do you guys
15 think here?

16 MICHAEL CAREY: I'm kind of thinking that based
17 upon the documents on record that recommend denying the
18 request. She can continue her appeal if she wants.

19 CARL CHISEM: Hmm. I don't know.

20 MICHAEL CAREY: I would need to see more than
21 this, too.

22 CARL CHISEM: Yeah. I mean, I know the agency
23 is not in the counseling, but, you know, I don't know.

24 JOHN DISETTE: Yeah, I mean, that's the thing.
25 I mean, if they just told her, without necessarily

1 counseling, that Tier IV is a hybrid plan, I can see that
2 being confusing.

3 CARL CHISEM: Yep.

4 JOHN DISETTE: So, you select the hybrid plan.
5 And what I don't know is, do they not counsel -- Ben,
6 when you say they don't counsel, do they give any
7 description as to what the plans are or just kind of give
8 you paperwork and say, pick one?

9 BEN SEDROWSKI: So, my understanding, at least
10 in this regard, at a minimum, they're provided
11 information regarding where to get to our materials for
12 retirement plan comparisons and so on and so so forth.
13 So, our higher ed section on our website has, you know,
14 those various kind of charts that explain the differences
15 to plans from a top level as well as, you know, I won't
16 call it, you know, expressly, you know, very nuanced
17 details, but it does have a little bit more detail in it
18 as well. Regarding any information directly from the
19 agency to her, though, you know, on what benefit compares
20 to what, I don't believe that there's anything direct
21 that she receives in that regard.

22 JOHN DISETTE: It appears to be a clean
23 selection, right? Because she checked off the Tier IV
24 box. She checked off option one with Tier IV and option
25 three and then cross -- scribbled something out. I tend

1 to accept that, but I'm seeing just a clear sheet where
2 she selected option three.

3 BEN SEDROWSKI: And to that point, I will state
4 that she does, you know, specifically state that she had
5 completed a new form, you know, following the completion
6 of the first one, for, you know, to have a clean form. I
7 just will state that, you know, she has made that, as,
8 you know, factual in her appeal.

9 MICHAEL CAREY: Ben, what would be the next
10 step if we were to deny this for her?

11 BEN SEDROWSKI: She would be eligible to
12 request reconsideration to where the Commission could
13 then authorize a hearing or an evidentiary hearing before
14 it or L&P at that point with new evidence or testimony.
15 Other than that, I do believe that would be her only
16 avenue at this point in the event that it was denied by
17 the Commission at this stage.

18 MICHAEL CAREY: Let's make a case before the
19 full Commission.

20 JOHN DISETTE: What would that look like as a
21 motion, Mike?.

22 MICHAEL CAREY: The motion is very simply that
23 we deny her request, then the Division would inform her
24 that that's happened and would inform her what next steps
25 she could take. I think that that's standard protocol.

1 Ben and Bert, (Indiscernible)

2 JOHN DISETTE: No, I'm with you, Michael.

3 MICHAEL CAREY: This is Mike Carey. I move
4 that the Subcommittee recommend to the full Commission
5 that they deny Ms. Kehoe's request.

6 JOHN DISETTE: And she's another one that --
7 she tried to change this before the pension started,
8 right?

9 BEN SEDROWSKI: Not before deductions were
10 remitted. That is correct. But it was after the first
11 day. It was after the commencement of her employment, so
12 it was late for the same day irrevocable election.

13 CARL CHISEM: How much time does she have to
14 appeal, Ben?

15 BEN SEDROWSKI: In the event that you denied
16 it, I believe standard procedure would give her one year
17 from the date of the denial to request reconsideration.

18 JOHN DISETTE: Okay, Mike, did you -- did you
19 make a motion, Mike?

20 MICHAEL CAREY: I did.

21 JOHN DISETTE: Did anyone second it yet?

22 MICHAEL CAREY: Not yet.

23 JOHN DISETTE: I'll second it. I just -- my
24 hesitation is only that I -- I understand the confusion.
25 Right? They sound the same. So I can sympathize with

1 checking the wrong box, I suppose.

2 CARL CHISEM: It happens. That's my --

3 MICHAEL CAREY: But then she can come before
4 the Commission and tell us about that.

5 JOHN DISETTE: Yeah.

6 CARL CHISEM: That's true. She has a year.

7 MICHAEL CAREY: Correct.

8 CARL CHISEM: Okay.

9 JOHN DISETTE: All right. All right. Okay,
10 I'm good.

11 PETER ADOMEIT: What's the motion, please?

12 MICHAEL CAREY: So, the motion's to deny, which
13 I made, John has seconded, and so call for the vote,
14 please.

15 PETER ADOMEIT: Okay. All in favor please say
16 aye. Opposed nay. It's unanimous. The ayes have it.

17 Teresa Wilson.

18 BEN SEDROWSKI: Okay. I actually saw her pop
19 in a few times. Is she in the waiting room by chance?

20 KIMBERLY WINTER: I haven't seen her come in.
21 I saw an iPhone number login.

22 BEN SEDROWSKI: Yeah, I believe that was her.
23 If the Subcommittee wouldn't mind, I'll just come off mic
24 for a second. I'll give her a call. She sent me an
25 email and I let her know to join as quick as she can a

1 few minutes ago, but I'd like to call with her to see if
2 she can join, so...

3 PETER ADOMEIT: Okay.

4 BEN SEDROWSKI: I'll be right back. Ms. Wilson
5 will be joining momentarily.

6 JOHN DISETTE: Thank you, Ben.

7 BEN SEDROWSKI: As a refresher, would we like a
8 refresher of her case prior to her arriving, or would you
9 like to wait till she is here and back in session?

10 PETER ADOMEIT: She should hear it.

11 BEN SEDROWSKI: Okay.

12 KIMBERLY WINTER: She should be joining now.

13 BEN SEDROWSKI: I'm ready to proceed whenever
14 you are, Peter.

15 PETER ADOMEIT: Okay, Ben, do you want to
16 summarize her case, please?

17 BEN SEDROWSKI: Yes. Ms. Wilson is on page 151
18 of your packet. Ms. Wilson has petitioned the Retirement
19 Commission to permit her to submit an application for
20 disability retirement past the 24-month deadline that is
21 associated with such an application.

22 In support of this, she particularly cited that
23 she was not advised that she was eligible to apply for a
24 disability retirement prior to her termination from
25 service and additionally that she has an ongoing Workers'

1 Compensation claim following her termination from
2 service, showing this ongoing continued disability post
3 employment.

4 To that end, Ms. Wilson was tabled at the
5 previous Subcommittee meeting to give her the opportunity
6 to come to the next Subcommittee meeting to present her
7 case and answer any questions the Trustees may have for
8 her regarding why she was unable to submit her
9 application within that 24-month window. And Ms. Wilson
10 is here presently today and I will turn it over to the
11 Trustees in regards to that, sir.

12 TERESA WILSON: I can talk?

13 PETER ADOMEIT: Yes. You have the floor.

14 TERESA WILSON: I'm sorry about that. I didn't
15 -- I wasn't aware of a medical pension or, to be honest
16 with you, I'm still not up to par on what it entails, but
17 I did several emails like since 2000, dating back prior
18 to '22. And you know, when you're speaking to other
19 employees, they're like, Hey, did you apply for your
20 medical? I reached out, but I'm not getting -- I reached
21 out to several different people in the email
22 (indiscernible). Finally, when I did get in touch, well,
23 I got an attorney. He asked me did I apply for it
24 (indiscernible)

25 JOHN DISETTE: If I could --

1 THERESA WILSON: Yes.

2 JOHN DISETTE: If I could interrupt. It's
3 cutting in and out on me. Is everyone else hearing this
4 clean?

5 MICHAEL CAREY: No, I'm experiencing the same
6 as you, John, cutting in and out.

7 TERESA WILSON: Oh, I'm sorry. What about now?

8 MICHAEL CAREY: It's okay. That's better.

9 PETER ADOMEIT: Close is good.

10 JOHN DISETTE: The last I think I heard is you
11 were asking employees --

12 TERESA WILSON: So I was asking employees, I
13 asked around. I even reached out to the union people. I
14 didn't get a response from the union people even prior to
15 getting terminated. I even have emails where I reached
16 out for an appeal as far as the termination part, because
17 I am still medically out. I have not, you know, been
18 back to work, but I got a new attorney and he asked me
19 about the pension and one of the State Attorney Generals
20 was in the meeting and he told me to, you know, go ahead
21 and apply and just send an email.

22 So after, I'm gonna say about approximately six
23 emails, I got a response, and then I was told, hey, I was
24 too late for it. I was supposed to apply for it in 2024,
25 but I'm like, well, I wasn't aware of that. So, that's

1 where I'm at.

2 MICHAEL CAREY: Ms. Wilson, hi, my name is Mike
3 Carey. Do you mind if I ask you a question or two?

4 TERESA WILSON: Yes.

5 MICHAEL CAREY: Thank you. So we see as part
6 of the record that there's been some Workers' Comp
7 activity.

8 THERESA WILSON: Yes.

9 MICHAEL CAREY: So, I'm wondering what -- when
10 you first left state service, were you receiving Workers'
11 Compensation at that time or did that all come later,
12 some period after you had already separated from state
13 service? Do you remember that?

14 TERESA WILSON: So, I was on workman (sic)
15 comp the entire time. The payments had stopped, but I
16 was still going, like, I was still, like, not receiving
17 payments. Let me see, no, because I didn't -- they had
18 stopped receiving the payments, but I still was going
19 through the workman comp process.

20 MICHAEL CAREY: Are you getting Workers'
21 Compensation now?

22 TERESA WILSON: Yes. I just didn't send my
23 medical -- I got terminated because I didn't put my
24 medical note in at the correct time. So, I reached out
25 to how I could appeal that and I didn't get a response.

1 I don't even have a response from them.

2 MICHAEL CAREY: So, did you get -- I'm
3 wondering if, you know, at that point in time you said
4 you filed an appeal. Do you know where you filed an
5 appeal with?

6 TERESA WILSON: No. I asked a question on how
7 to --

8 MICHAEL CAREY: On how to...

9 THERESA WILSON: -- to do an appeal. What can
10 I do as far as the job termination. Then, when my
11 attorney, the new current attorney, Senich, he asked me
12 had I applied for the pension, and I told him I wasn't
13 aware of that, you know, or how to do it. So, that's
14 when I reached out and finally I got someone after maybe
15 -- everybody kept coming in saying, we see -- you know, I
16 got emails saying, we see you're reaching out. Did they
17 respond? So now you have to reach out to POD. So I sent
18 the letter out. I'm gonna -- I don't know the date
19 because I don't want to lie to you guys. I don't
20 remember the date. It was this year I sent the certified
21 letter out for the appeal. I followed the steps. Two
22 attorney generals, you know, said, okay, just go ahead,
23 put my name in the appeal, so I did that this year, the
24 appeal to apply.

25 MICHAEL CAREY: So, the question I would have

1 would be at the time you -- you mentioned that you had
2 separated from state service, did you get a letter from
3 the State saying that you were being separated from state
4 service?

5 TERESA WILSON: I got an email.

6 MICHAEL CAREY: You got an email?

7 TERESA WILSON: Yes.

8 MICHAEL CAREY: Is -- I don't know if that's
9 part of our packet. If you have the content of that
10 email, if you have that, that is some -- if that's
11 something that we could review, that might help us. So,
12 if you have that, I'm wondering if you would be able to
13 provide that to us.

14 Any kind of communication that you received.
15 Where were you employed? Was it DMHAS?

16 TERESA WILSON: Yes. Southbury Training
17 School.

18 MICHAEL CAREY: DDS. Okay. Anything that you
19 received from them or from the POD. So, you -- you were
20 not on FMLA at the time?

21 TERESA WILSON: No, no.

22 MICHAEL CAREY: Okay.

23 TERESA WILSON: And I submitted from the POD.
24 That's who -- so, finally, at the end, that's when I was
25 told to reach out to the POD. So, when I reached out

1 POD, it took about -- I could send you those emails, too,
2 because I went through a lot of emails of not getting a
3 response, and I was reaching out to a lady who said that
4 she would help me. I have her emails, too, a list of
5 emails telling me what to do, to do the appeal.

6 MICHAEL CAREY: How soon after you left state
7 service were you interacting with the POD? Do you
8 remember that?

9 TERESA WILSON: Yeah, that was this -- I want
10 to say, the end of '25.

11 MICHAEL CAREY: The end of '25.

12 THERESA WILSON: Yes, it was too late, and
13 that's when I was told that it was too late, but to
14 reapply.

15 MICHAEL CAREY: So that -- so those kinds of
16 materials would be, you know, I don't speak for the other
17 Trustees, but in terms of me, from my looking at this
18 case and what we may or may not be able to do here
19 regarding your request, that those documents would be
20 really helpful for me in looking at the entirety of the
21 record. So, if you have them and can provide them, you
22 know, I, for one, would be glad to look at them.

23 TERESA WILSON: Okay. I do have them, but I
24 don't think I can do it while I'm on the phone.

25 MICHAEL CAREY: No, no, I'm not suggesting that

1 you -- I mean, if you could do it now, that'd be
2 fantastic, but no, no, I'm not -- I'm not asking you for
3 that.

4 THERESA WILSON: Okay.

5 MICHAEL CAREY: But if you could -- so, I
6 guess, where I'm headed with this, Ms. Wilson, is that I
7 would like for you to be able to provide those so that we
8 can look at them.

9 TERESA WILSON: Okay.

10 MICHAEL CAREY: I have to check with my
11 colleagues, but my thought would be that we table the
12 matter again so that you can send that to us so that we
13 could do a more thorough review of the case record, and
14 then we can more accurately determine what would be the
15 appropriate course of action for us to take regarding
16 your appeal.

17 TERESA WILSON: Understood. Okay. I can.

18 PETER ADOMEIT: To whom should she send the
19 email?

20 BEN SEDROWSKI: You can send those directly to
21 me if you'd like, Ms. Wilson.

22 TERESA WILSON: Okay.

23 BEN SEDROWSKI: And I will forward them for the
24 Subcommittee's review.

25 TERESA WILSON: Okay. All right.

1 MICHAEL CAREY: So, anything -- before -- and I
2 will make a motion that we table, but, you know, again,
3 Ms. Wilson, anything that you've got, any kind of
4 communication that you had regarding questions that you
5 were asking, you know, anywhere, either before or after
6 you left state service, anything to help us fill in the
7 gap to see what kind of communication you are having with
8 whom. That would be extremely helpful.

9 TERESA WILSON: Okay, I'll send it all. It's
10 about seven to eight different people, but I will send
11 it.

12 MICHAEL CAREY: Okay, well, that helps us a
13 lot. And I see my colleague, Trustee Disette, has a
14 question.

15 THERESA WILSON: Yes.

16 MICHAEL CAREY: At least he has his hand
17 raised.

18 JOHN DISETTE: I do. Just two quick questions
19 for my clarity. Have you started receiving or applied
20 for normal pension or early retirement pension?

21 TERESA WILSON: No.

22 JOHN DISETTE: Not yet?

23 THERESA WILSON: No.

24 JOHN DISETTE: Okay. And have you applied for
25 Social Security Disability?

1 TERESA WILSON: No.

2 JOHN DISETTE: Okay.

3 TERESA WILSON: Kind of a little -- I hate to
4 say, like a little -- what's the word I'm looking for?
5 I'm not knowledgeable on this. So, the questions that
6 you're asking me now, I will follow up, you know, when I
7 get off the phone, I will try to follow up on it. I
8 wasn't sure I could do any of this. I didn't even know
9 about a medical pension. I don't even know about --
10 understand how the -- when they say you're fully vested
11 or something like that, I don't even understand that.

12 JOHN DISETTE: Okay. Okay. And you do
13 understand that there is a process. We don't grant the
14 disability pension, right? You have to go through the
15 medical board if you're granted the ability to apply for
16 disability for the -- you know, if you're -- if you're
17 granted the ability to apply for the disability pension,
18 you then have to go before the medical board, right?

19 TERESA WILSON: I didn't know, but now I know.
20 I didn't know. Now I know because you're saying it.

21 JOHN DISETTE: All we can do , at best, would
22 be potentially grant your ability to apply for it despite
23 being past the deadline.

24 THERESA WILSON: Correct.

25 JOHN DISETTE: But it's absolutely no guarantee

1 that you get it at all.

2 TERESA WILSON: Correct. I do understand that
3 part, yes.

4 JOHN DISETTE: Okay. Okay. Anything else?

5 PETER ADOMEIT: Anything further?

6 TERESA WILSON: No.

7 PETER ADOMEIT: Do you have an attorney?

8 TERESA WILSON: I -- well, not for this, but I
9 have an attorney for the workman comp.

10 PETER ADOMEIT: I see. Thank you.

11 TERESA WILSON: Okay.

12 PETER ADOMEIT: Okay.

13 TERESA WILSON: All right.

14 PETER ADOMEIT: Anything further?

15 TERESA WILSON: No, I don't have any more
16 questions.

17 PETER ADOMEIT: How about the group here,
18 Subcommittee? Anything further? Okay. Thank you.

19 MICHAEL CAREY: Mr. Chairman, this is Mike
20 Carey. Given Ms. Wilson's commitment to provide us with
21 additional documentation so that we can review the matter
22 fully, I recommend that we table this matter regarding
23 her ability to apply for disability retirement until our
24 next meeting.

25 CARL CHISEM: Carl Chisem, I'll second.

1 PETER ADOMEIT: Any discussion? Hearing none,
2 all in favor say aye or raise your hand. Yeah, it's
3 unanimous. The ayes have it.

4 JOHN DISETTE: Thank you.

5 TERESA WILSON: Thank you.

6 PETER ADOMEIT: Thank you.

7 MICHAEL CAREY: Thanks, Ms. Wilson.

8 PETER ADOMEIT: That completes the agenda, so
9 time for adjournment, I think.

10 MICHAEL CAREY: Unless Ben tells us otherwise.

11 BEN SEDROWSKI: That is everything for me.

12 PETER ADOMEIT: All in favor, say aye or raise
13 your hand. As always unanimous.

14 MICHAEL CAREY: I'll move, I'll second.

15 PETER ADOMEIT: Yeah.

16 MICHAEL CAREY: There we go.

17 PETER ADOMEIT: Okay. Thanks a lot. Nice
18 meeting, everybody.

19 JOHN DISETTE: Thank you.

20 BEN SEDROWSKI: Thank you. Good day, everyone.

21 PETER ADOMEIT: Bye-bye.

22

23 (Meeting adjourned at 10:22 a.m.)

24

25

REPORTER'S CERTIFICATE

I, Wendy Malitsky, do hereby certify that the foregoing is, to the best of my skill and ability, a true and accurate transcript of the State Employees' Retirement Commission, Purchase of Service and Related Matters Subcommittee held on July 21, 2026.



Wendy Malitsky, Notary Public

My Commission Expires March 31, 2030

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