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## CORRESPONDENCE MEMORANDUM

**DATE:** February 12, 2010  
**TO:** Teachers Retirement Board  
Wisconsin Retirement Board  
**FROM:** Diane Poole, Director  
Disability Programs Bureau  
**SUBJECT:** October – December 2009 Quarterly Disability Annuity Statistics

**This memo is for informational purposes only. No Board action is required.**

Attached is the Wisconsin Retirement System (WRS) *Disability Benefit Annuity Statistical Report* for October through December 2009. The report provides quarterly data on: number of annuities started, options selected, gender, determination, age, and disability type.

### TRENDS

The trends, when compared to the same quarter over the past five years, are as follows:

- The number of new disability annuities is lower. The Teachers Retirement Board (TR) had 10 under its jurisdiction, compared to an average of 15.6; the Wisconsin Retirement Board (WR) had 32 under its jurisdiction, compared to an average of 47.8.
- The most-selected annuity options under TR and WR jurisdiction were “100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed.”
- For TR Board, females continue to be the predominant user of the § 40.63 Disability Retirement Annuity benefit. For WR Board, females are a slightly higher user.
- The majority of applications are approved; a very small number are denied.
- This quarter one participant chose to cancel their disability annuity to return to work. This accounts for an additional application in the *Wisconsin Retirement Board Disability Application Submitted by Determination* chart.
- The predominant age group for both TR Board and WR Board annuities is 51-55.
- The prevalent disability types for TR Board annuities for this quarter in the last five years are: cancer, neurology and mental illness. For WR Board annuities, the prevalent disability types are: orthopedic, neurology, and multiple medical problems.

Reviewed and approved by Lisa Ellinger, Division of Insurance Services.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Board	Mtg Date	Item #
WR	3.18.10	5Ai
TR	3.18.10	5Ai

## **PRIORITIES**

The top priority for the Disability Programs Bureau is to approve disability benefits as quickly as possible so individuals are not without income. Approving a disability benefit requires extensive follow-up with the applicant, employer, and health care providers. An application can take up to a year to process because of this inherent dependency on outside sources to provide documentation. The second priority is to maintain existing disability accounts. This requires obtaining the necessary medical and income information, which again requires extensive communication with outside sources.

We would appreciate any feedback that you may offer for improving this report. Please contact me at (608) 266-5387 or [diane.poole@etf.state.wi.us](mailto:diane.poole@etf.state.wi.us) if you have any comments or questions.

Attachment: Disability Benefit Annuity Statistical Report

## 2009 v. 2008 Disability Estimates Requested & Completed

