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Correspondence Memorandum

Date: June 1, 2023

To: Employee Trust Funds Board

From: Anne Boudreau, Deputy Administrator
Division of Retirement Services

Subject: Customer Service Improvements and Trends

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

This document provides information about current activities in the Division of Retirement Services, including workload demand, customer use of self-service options, and process improvement projects.

Workload Demand

Retirement Estimates, Applications, Annuities Started, Lump Sums

Comparing the first quarter of 2023 to that same quarter in 2022, the number of retirement estimate requests increased, while applications, new annuities, and retirement lump-sum benefits all decreased.

	Q1 2022	Q1 2023	Change (%)
Retirement Estimates Requested	6,534	6,755	+3.4%
Retirement Applications Received	3,344	2,732	-18.3%
Retirement Annuities Started	3,486	2,732	-21.6%
Retirement Lump Sums Paid	469	423	-9.8%

Comparing the first quarter of 2023 to the first quarter of 2022, the average turnaround time for a retirement estimate improved from 11.2 days to 4.5 days.

Reviewed and approved by Matt Stohr, Administrator, Div. of Retirement Services
Electronically Signed 06/06/23

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Customer Service Improvements and Trends

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Customer Service - Members

Call volume increased in the first quarter of 2023 as compared to the same quarter in 2022.

	Q1 2022	Q2 2023	Change (%)
Calls	52,836	54,581	+3.3%
Email	6,044	6,182	+2.3%
Total	58,880	60,763	+3.2%

The average speed of answer in the first quarter of 2023 was 5 minutes, 48 seconds, compared to 4 minutes, 53 seconds in the first quarter of 2022. This increase is consistent with the increase in volume, which rose steadily as the quarter progressed and members' tax questions increased due to the W-4P tax changes.

Customer Service and Process Improvements

Better Interface for Member Meetings

ETF offers member retirement sessions in many formats so that members may choose what works for them. These include in-person individual or group appointments, conducted in Madison and at various other locations around the state, telephone appointments, and virtual appointments. ETF recently implemented Microsoft Teams as a replacement for its previous member interface tool for virtual appointments. This has resulted in significant improvements in the member experience, increased ease of use for staff and for members, and more seamless security features.

Successful Wisconsin Retirement System (WRS) Annual Reconciliation

Between January 1 and April 15 each year, ETF reconciles data that employers submitted for their employees for the previous year. Each member account is reconciled to ensure all contributions have been paid and the appropriate service and earnings were credited. If there are data discrepancies, ETF contacts the employer and assists in identification and resolution. This process is a prerequisite to generating the Annual Statements of Benefits, which is one of the most important ways ETF shares WRS information with members each year. The Employer Services Section successfully completed annual reconciliation for 2022—virtually, ahead of schedule, without any overtime hours for staff, and with the highest number of employer reports arriving in balance and without the need for intervention by ETF.

Staff reconciled the data of 1,618 WRS employers and more than 260,000 active WRS employees. This year compared to last year, there was a 24% increase in the number of employer accounts that arrived in balance.

This improvement in employer accuracy and the correspondingly boost to ETF staff efficiency are attributable to more time dedicated to employer training (provided in person and via webinars), monthly training reminders for employers, updates to ETF's

online reporting system, increased targeted in-house queries to locate reporting anomalies, diligent follow up and case management, and employer compliance reviews.

Accurate Death Information

Previous Board memos discussed the replacement of our “death match service.” ETF pays for data from both the Wisconsin Department of Health Services (DHS) and from a private vendor in order to be aware when a retiree or named survivor has died.

Approximately 85% of WRS retirees remain in Wisconsin, so any deaths among that population are reported to us by DHS. For out-of-state deaths, ETF recently implemented a new death match service, provided by PBI Research Services (PBI). Because PBI and our other vendor (Berwyn) obtain data from a different set of states and because PBI scours online obituaries for information ETF has been become aware of some deaths it did not know about and triggered ETF to stop associated annuity payments and begin collections on those overpayments.

PBI recently merged with Berwyn. This merger expands the death match service coverage and enables timely death notifications that in turn minimize annuity overpayments.

Staff will be at the Board meeting to answer questions.