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Correspondence Memorandum

Date: August 27, 2024

To: Employee Trust Funds Board

From: Anne Boudreau, Deputy Administrator
 Division of Benefit Administration

Subject: Customer Service Member and Employer Data, Improvements, and Trends

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

This document provides information about current operational activities in the Division of Benefit Administration, including member and employer workload demand, process improvements, and trends. In addition to operational activities, a large percentage of staff are working on the insurance administration and pension administration modernization initiatives.

Workload Demand

Retirement Estimates, Applications, Annuities Started, and Lump-Sum Benefits

Comparing the second quarter of 2024 to that same quarter in 2023, the number of retirement estimate requests, retirement applications, new retirement annuities, and retirement lump-sum benefits all increased.

	Q2 2023	Q2 2024	Change (%)
Retirement Estimates Requested	6,523	7,145	9.5%
Retirement Applications Received	4,697	5,205	10.8%
Retirement Annuities Started	3,427	3,437	0.3%
Retirement Lump Sums Paid	717	769	7.3%

Comparing the second quarter of 2024 to the second quarter of 2023, the average turnaround time for a retirement estimate increased from 5.5 days in 2023 to 6.3 days in 2024.

Customer Service – Members

Call volume decreased in the second quarter of 2024 as compared to the same quarter in 2023.

Patti Epstein

Reviewed and approved by Patti Epstein, Chief Benefits Officer, Division of Benefits Administration
 Electronically Signed 09/04/2024

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ETF	09.19.24	6D

	Q2 2023	Q2 2024	Change (%)
Calls	52,254	50,536	-3.3%
Email	4,833	4,717	-2.4%
Total	57,025	55,253	-3.1%

The average speed of answer in the second quarter of 2024 was 1 minute, 22 seconds, compared to 4 minutes, 14 seconds in the second quarter of 2023. This improved speed of answer was primarily due to lower call volume.

Customer Service and Process Improvements

New Online Separation Benefit Application

Following the April mailing of the *Annual Statements of Benefits*, the Member Services Call Center experiences increased calls. The *Annual Statement* is one of the Department of Employee Trust Funds' (ETF's) best current opportunities to communicate with WRS members regarding their WRS retirement account balances.

Members call with questions about their service and earnings, may request retirement estimates, or may call to change their name, address, or beneficiary. On average 14,000 members call each year to request a *Separation Benefit Application*. The majority of these requests are filled by sending the *Separation Benefit Application* with a "packet" of information — in paper form, via US mail.

Approximately 800 of *Separation Benefit Applications* are submitted to ETF each month. Unfortunately, about 13% are either rejected or require special handling to obtain missing information from the member.

Working together, ETF's Customer Experience team and operations staff redesigned the *Separation Benefit Application* form and made it available online with new educational content for members regarding the benefit and the application process.

Data shows that 3,000 users downloaded the new online application form in the first three months it was accessible. A similar number of separation benefit applications are processed by ETF in the months of April through June each year. Data shows a decline in the rejection rates due to errors and omissions by members who use the new application form.

Each time ETF places another self-service tool online, members have used it in high numbers, benefitting members, employers, and ETF.

Staff will be at the Board meeting to answer any questions.