



STATE OF WISCONSIN
Department of Employee Trust Funds
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Correspondence Memorandum

Date: March 18, 2025
To: Employee Trust Funds Board
From: Kim Esselman, Appeals Coordinator
Office of Legal Services
Subject: Pending Appeals Annual Report 2024

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

During calendar year 2024, 23 new appeals were filed, seven final decisions were issued, and 16 appeals were withdrawn. As of February 24, 2025, there were 46 pending appeals. Table 1 indicates the total number of pending appeals under the authority of the Employee Trust Funds Board (ETF), Group Insurance Board (GIB), Wisconsin Retirement Board (WR), and Teachers Retirement Board (TR). There were zero pending appeals under the authority of the Deferred Compensation Board (DC).

Table 1. PENDING APPEALS BY BOARD

ETF	GIB	WR	TR	DC
17	12	14	3	0

The 23 new appeals filed in year 2024 is a decrease from the number of new appeals filed in the previous calendar year. Table 2 provides the total number of new appeals filed by year since 2021:

Table 2. NEW APPEALS FILED BY YEAR

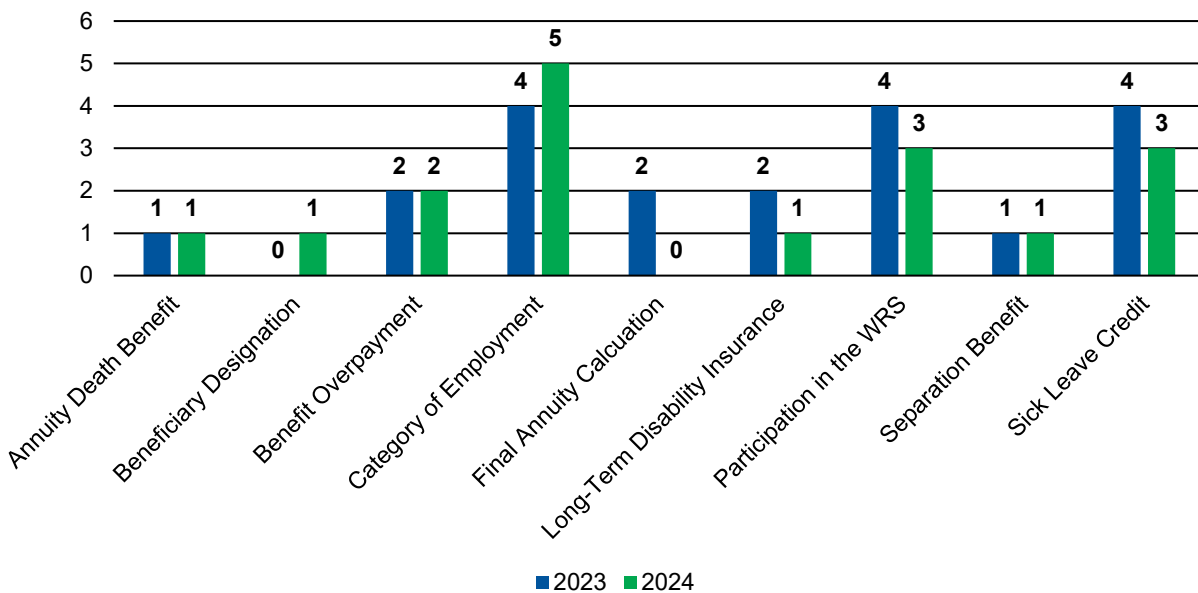
2021	2022	2023	2024
14	12	24	23

Board	Mtg Date	Item #
ETF	03.27.25	6I

The ETF Board has the authority to accept timely appeals from determinations made by the Department, other than appeals of determinations made by the Department regarding disability annuities under Wis. Stat § 40.03(1)(j). Chart 1 lists all the active appeals, which include one involving an annuity death benefit, one involving a beneficiary designation, two involving overpayments, five involving category of employment, one involving Long-Term Disability Insurance (LTDI), three involving the member's participation date in the Wisconsin Retirement System (WRS), one involving the member's separation benefit, and three involving sick leave credit.

Authority for hearing LTDI appeals was transferred to the ETF Board on January 1, 2018. Since the LTDI program is closed to new applicants, future LTDI appeals would be limited to issues raised by members already receiving the benefit. One example would be an appeal based on the termination of an LTDI benefit.

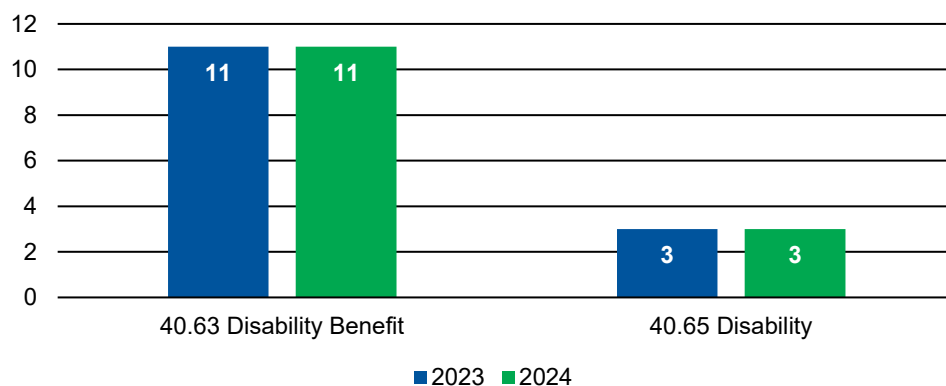
Chart 1. EMPLOYEE TRUST FUNDS APPEALS BY TOPIC



The WR Board has the authority to accept timely appeals of determinations made by the Department regarding disability annuities for participants other than teachers under Wis. Stat. § 40.03(8)(f). In addition, duty disability determinations made by the Department, such as calculations of the benefit amount, are subject to appeal to the WR Board as provided under Wis. Admin. Code § ETF 52.28(1).^{*} Chart 2 lists all the active appeals, which include 11 disability retirement benefit (40.63) appeals and three duty disability (40.65) appeals.

^{*} Determinations made by the Department of Employee Trust Funds as to an applicant's eligibility for duty disability benefits may be appealed to the Department of Workforce Development. Wis. Admin. Code § ETF 52.28(2).

Chart 2. WISCONSIN RETIREMENT BOARD APPEALS BY TOPIC



The TR Board has the authority to accept timely appeals of determinations made by the Department regarding disability annuities for teacher participants under Wis. Stat. § 40.03(7)(f). There are three active appeals for the TR Board involving 40.63 disability retirement benefits.

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