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## Correspondence Memorandum

**Date:** June 4, 2025  
**To:** Employee Trust Funds Board  
**From:** Anne Boudreau, Deputy Administrator  
Division of Benefits Administration  
**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 Benefits Administration, including member and employer workload demand, process improvements, and trends.

### Workload Demand

#### Retirement Estimates, Applications, Annuities Started, Lump Sums

Comparing the first quarter of 2025 to first quarter in 2024, the number of retirement estimate requests, retirement applications, new retirement annuities, and retirement lump-sum benefits all increased.

	Q1 2024	Q1 2025	Change (%)
Retirement Estimates Requested	6,965	7,126	+2.3%
Retirement Applications Received	3,177	3,488	+9.8%
Retirement Annuities Started	2,260	2,381	+5.4%
Retirement Lump Sums Paid	616	673	+9.3%

Comparing the first quarter of 2025 to the first quarter of 2024, the average turnaround time for a retirement estimate increased from 6.7 days in 2024 to 8.0 days in 2025. This was due primarily to directing more resources to member telephone calls and to appointments. Member demand has increased along with the number of benefit applications and benefits paid.

*Patti Epstein*

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### Customer Service – Members

Call volume decreased in the first quarter of 2025 as compared to the same quarter in 2024.

	<b>Q1 2024</b>	<b>Q1 2025</b>	<b>Change (%)</b>
Calls	51,116	50,161	-1.9%
Email	5,843	5,604	-4.1%
Total	56,959	55,765	-2.1%

The average speed of answer in the first quarter of 2024 was 1 minute, 48 seconds, compared to 1 minute, 37 seconds in the first quarter of 2025. This improved speed of answer was primarily due to the addition of staff. The decrease in calls is slight. The decrease in email is a bit more significant. This is because when call volume and speed of answer increase, members try other avenues to contact ETF. The fact that the speed of answer was favorable means that fewer members abandoned their calls and then tried an email contact.

### Service Levels

In terms of service level goals, we are not meeting these for retirement applications or for appointments.

For applications, our goal is to process 90% within one week after we have all necessary information, such as the employer's final report with earnings and termination date. For the first quarter of 2025, we were at 85.4%. This is close to the SLA goal and similar to the first quarter of 2024, when we were at 84.6%.

For appointments, we averaged 35.6 days before a member could get an appointment (virtually or in person, individually or in a group) in the first quarter of 2025 as compared to an average 34.4 day wait during the first quarter of 2024. This metric is affected by availability of staff.

## **Customer Service and Process Improvements**

### Preparations for Insurance Administration System

Preparations for the Insurance Administration System (IAS) go live date on July 1 continue in earnest. This is the focus of staff.

Since March, members have been able to access their annual *Statements of Benefits* (ET-7365) via ETF's online portal. The soft rollout was followed by advertising the new functionality via an insert included with the annual statements. Members can view and reprint older statements as far back as 2012.

The timing of the rollout was strategic, introducing our members and our staff to creating online accounts that will also be used to access the new Insurance Administration

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System. Any accounts created now will not need to be created during an open enrollment. In the first month, more than 10,000 members set up accounts to access their annual statement via the portal.

Other readiness activities include developing procedures and training for ETF staff and for the Universities of Wisconsin payroll and benefits staff. Dozens of work procedures have been added or changed to account for tasks to be done in IAS. In addition, old procedures must be maintained for non-UW employers, which will not be using IAS yet.

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