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Correspondence Memorandum

Date: September 22, 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 workload demand, process improvements, and trends.

Workload Demand

Retirement Estimates, Applications, Annuities Started, Lump Sums

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

	Q2 2024	Q2 2025	Change (%)
Retirement Estimates Requested	7,064	6,987	-1.1%
Retirement Applications Received	5,225	4,946	-5.3%
Retirement Annuities Started	3,437	3,497	+1.8%
Retirement Lump Sums Paid	864	1,084	+25.5%

For the same period, the average turnaround time for a retirement estimate increased from 6.3 days to 7.7 days. The increase in retirement estimate processing time was due to weekly training sessions that occurred early in the quarter, staffing shortages, and more resources being devoted to member appointments.

Patti Epstein

Reviewed and approved by Patti Epstein, Chief Benefits Officer, Division of Benefits Administration
Electronically Signed 09/09/2025

Board	Mtg Date	Item #
ETF	10.02.25	5G

Customer Service - Members

Call volume decreased for the same period.

	Q2 2024	Q2 2025	Change (%)
Calls	50,536	49,537	-2.0%
Email	4,717	4,355	-7.7%
Total	55,253	53,892	-2.46%

The average speed of answer increased from 1 minute and 22 seconds to 1 minute and 46 seconds. This increase was due to fewer staff available to take calls during this period. Additionally, the quarter includes several annual events—such as the *Statement of Benefits* mailing and tax-related inquiries—that contribute to increased call complexity and, consequently, slightly longer wait times.

Customer Service and Process Improvements

Retirement Benefit Estimates and Application Revision

As part of our ongoing effort to improve member communications and reduce application errors, we successfully completed a comprehensive redesign of the *Retirement Benefit Estimates and Application* form (ET-4301).

Key updates include plain language revisions to enhance readability, numbered section headers for easier navigation, an updated tax section for consistency with other ETF forms, and the removal of embedded instructions (which caused clutter and made it harder for members to consume all the information on the form). Instructions are now provided in a new standalone guidance document included with each application. The redesigned form is expected to improve the member experience and reduce the rejection rate of applications submitted by members.

Improved Process for Finding Lost Contacts

Additional member communication efforts have been focused on improving our processes for locating and reconnecting with members with whom we have lost contact. Key process improvements include: 1) streamlining internal workflows to clarify responsibilities, eliminate redundancies, and improve coordination across teams; and 2) increasing the staff time and effort allocated to lost contact recovery.

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