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## Correspondence Memorandum

**Date:** March 19, 2025  
**To:** Executive Committee  
**From:** Gene Janke, Benefit Services Bureau Director  
Division of Benefits Administration  
**Subject:** Disability Communications

**This memo is for informational purposes only. No Committee action is required.**

The Executive Committee (Committee) of the Employee Trust Funds Board requested information regarding disability program communications based on a recent, closed appeal dealing with Long Term Disability Insurance (LTDI) benefits administration. Below is a summary of actions under consideration by the Department of Employee Trust Funds (ETF).

- ETF will review the "Reasonable Number of Contacts to Members/Beneficiaries" policy for any applicable changes.
- ETF will continue to review communications with members and use plain language, when possible, as well as highlight consequences of actions or non-actions in letters and forms.
- ETF will provide more in-depth notation of communications to make sure that clarifications in customer service are clearly documented. Additionally, ETF will increase detail included in documentation related to the efforts of confirming contact information for members.
- ETF is considering the following potential enhancements to member communications regarding disability applicants for other programs:
  - Providing informational material for disability estimates and applications, as well as provide counseling sessions to program applicants. ETF may include informational resources about guardianships, various types of Powers of Attorney, and contact information for entities such as Aging and Disability Resource Centers. Additionally, ETF can provide other information about its Authorization to Disclose form should a member need the ability to have someone else communicate with ETF on the member's behalf. ETF may also include that information in its counseling sessions.

*Patti Epstein*

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- Disability Program Section (DPS) case managers have checklists as an internal resource when guiding applicants through the application process. ETF will have DPS add similar information, as stated above, to their checklists.

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