



STATE OF WISCONSIN
Department of Employee Trust Funds

Retirement Services Update

Calendar Year 2013 – Third Quarter

Presented by: Anne Boudreau

Board	Mtg Date	Item #
JM	12.05.13	3B2

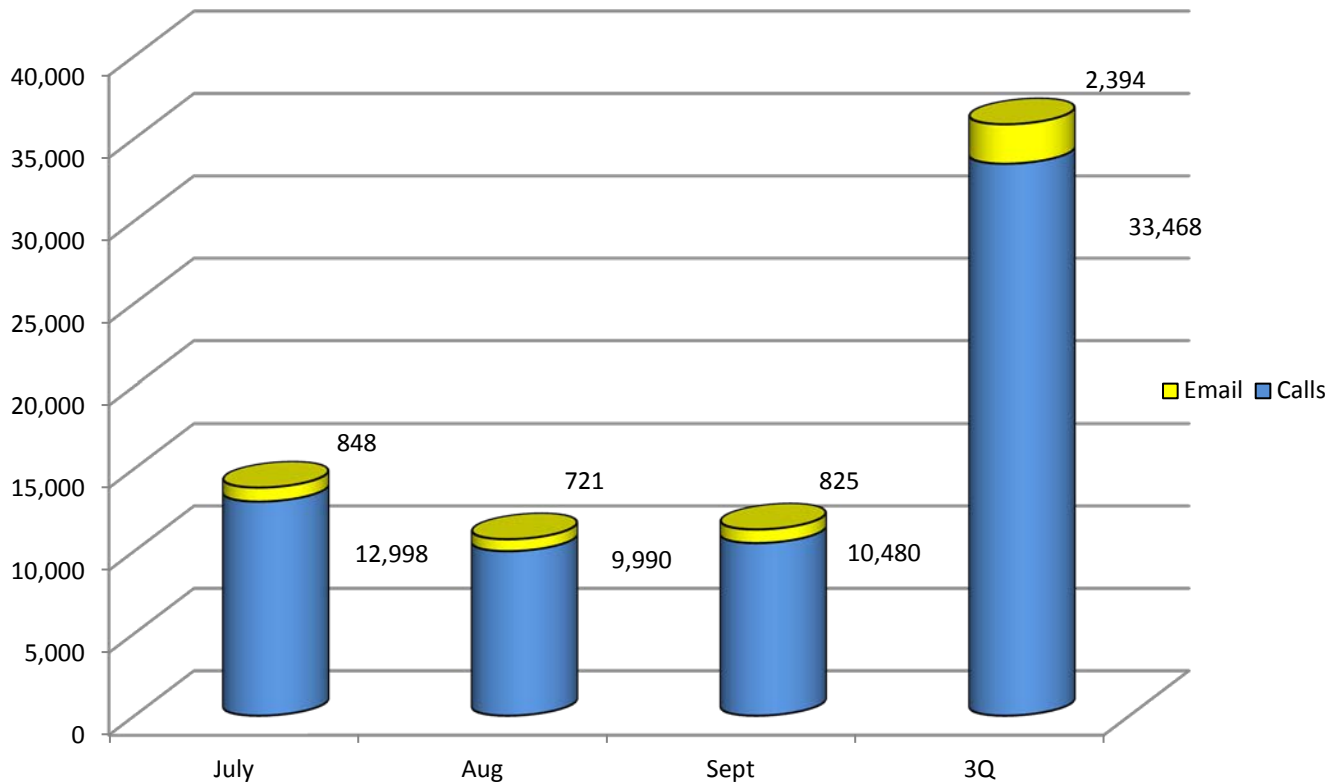


Customer Service

WRS Member Contacts

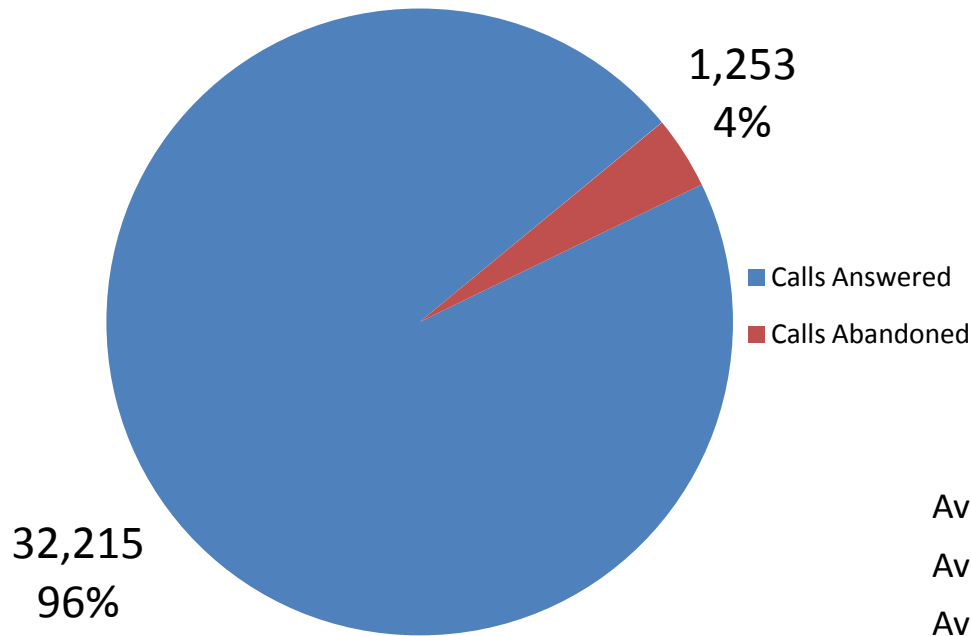
Telephone Calls to Main Line 3rd Quarter 2013

- During the period July – September 2013, there were 33,468 calls received on the main member line.
- Calls increased by approximately 0.5% compared to the same quarter last year.



WRS Member Contacts

Telephone Calls to Main Line
3rd Quarter 2013



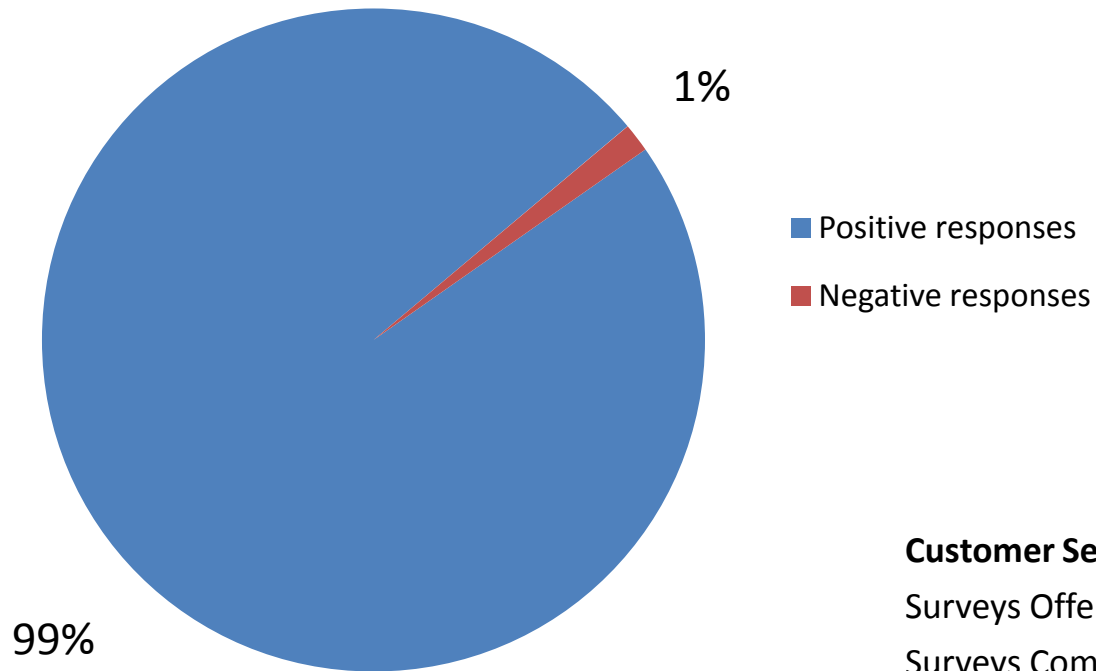
Average speed of answer	0:56
Average talk time	5:00
Average handle time	5:26



Calls answered in less than one minute!

WRS Member Contacts

Telephone Calls to the Main Line – Survey Results 3rd Quarter 2013



Customer Service Survey

Surveys Offered	21,718
Surveys Completed	7,028
Survey Completion Rate	32.4%



99% of callers had a positive experience!

WRS Member Contacts

Telephone Calls to the Main Line – *It's Your Choice* 3rd Quarter 2013

2012	ASA
Week 1	0:01:28
Week 2	0:00:59
Week 3	0:01:45
Week 4	0:01:47
Overall ASA	0:01:30
Total Calls Answered:	13,659

2013	ASA
Week 1	0:00:55
Week 2	0:00:39
Week 3	0:01:03
Week 4	0:01:58
Overall ASA	0:01:09
Total Calls Answered:	13,703



This year: Wait times decreased 23.3%!!



WRS Member Contacts

Attendance at Retirement Sessions 3rd Quarter 2013

- During the 3rd Quarter of 2013, member attendance at individual and group retirement sessions totaled 2,155.
- The number of members walking in without an appointment remains lower than what we have seen in previous years, due to our very successful outreach program.

Small Group Retirement Sessions

Number of Sessions	62
Number of Members Served	703

Field Presentations

Number of Sessions	14
Number of Attendees	720

Individual Retirement Sessions

Number of Members Served	1,452
- <i>with appointment</i>	887
- <i>without appointment</i>	565



WRS Member Contacts

File Updates for Members 3rd Quarter 2013

- Members requested more than 7,000 updates to their account information during the 3rd Quarter of 2013.

	July	Aug	Sept	Quarter
Beneficiary Designations	1,545	2,053	2,423	6,021
Military Service Affidavits	22	73	11	106
Rehired Annuitant Elections	102	231	417	750
Domestic Partner Affidavits	67	72	70	209
	1,736	2,429	2,921	7,086



WRS Member Contacts

File Updates for Retirees 3rd Quarter 2013

Address Changes

Directly Requested by Annuitant	19,775
Automatically Updated (by NCOA Service)	4,264
Total	24,039

Tax Withholding Changes

Directly Requested by Annuitant	3,152
Automatically Updated (due to tax table changes)	738,407
Total	741,559

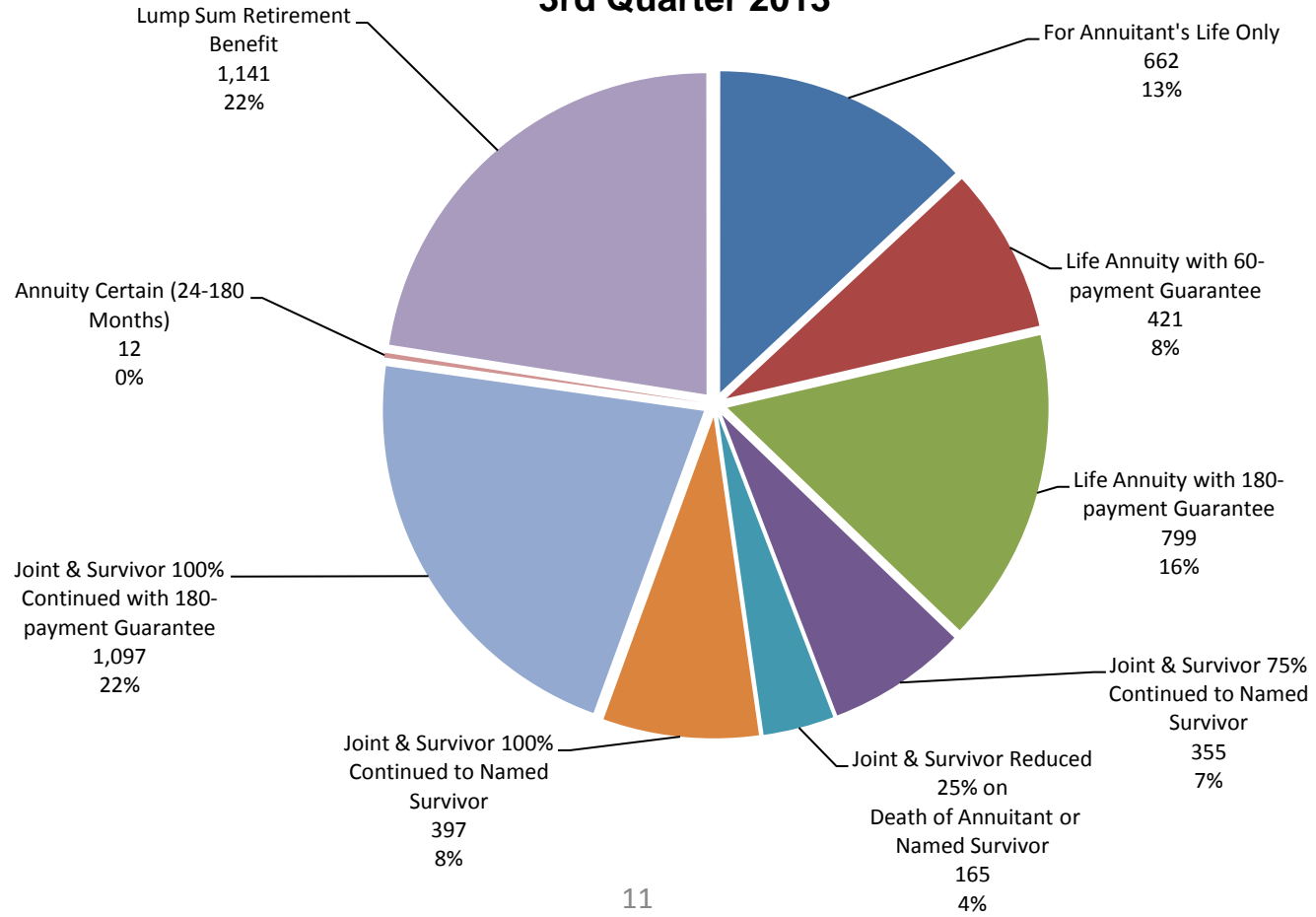
Health Insurance Transactions

Sick Leave Transactions	48,117
Health Coverage Changes	2,081
Total	50,198

Trends

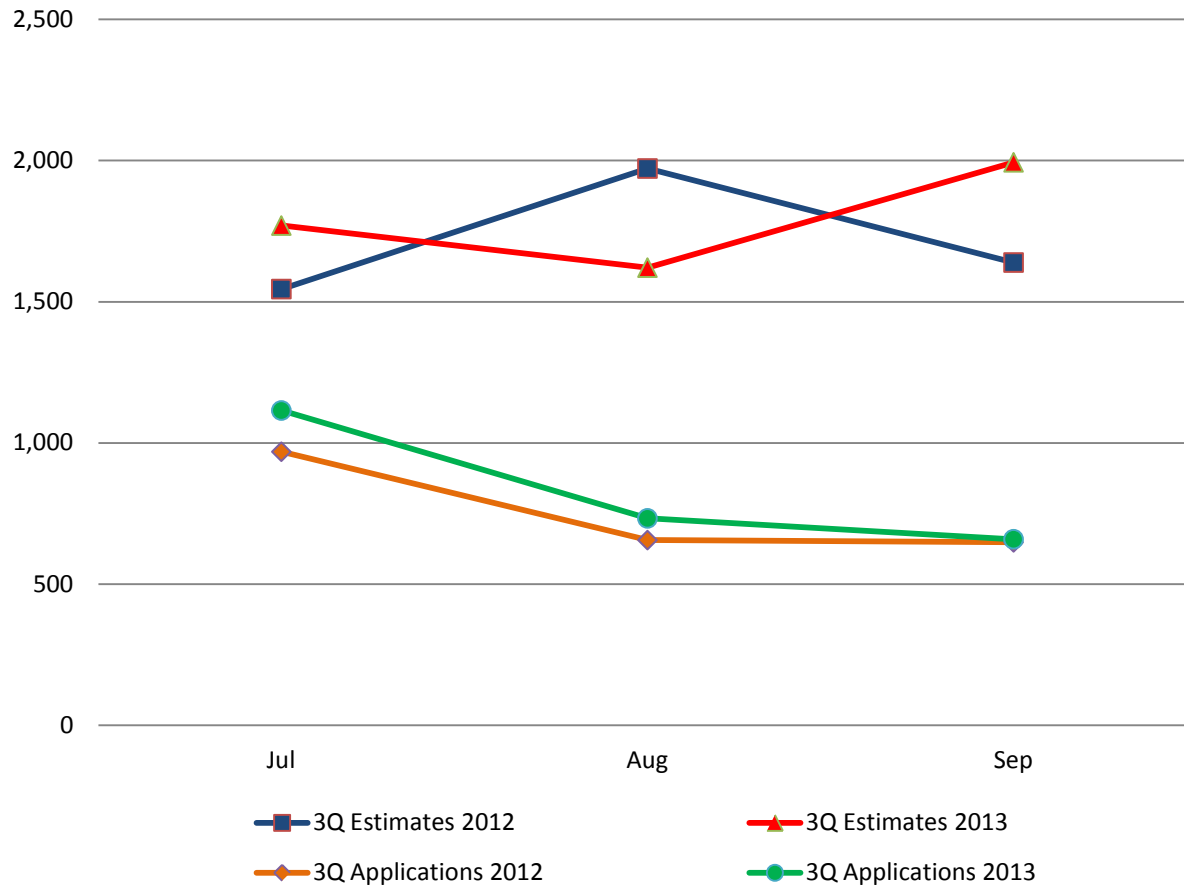
WRS RETIREMENT ANNUITIES

Benefit Options Taken Finalized Annuities and Lump Sum Retirement Benefits 3rd Quarter 2013

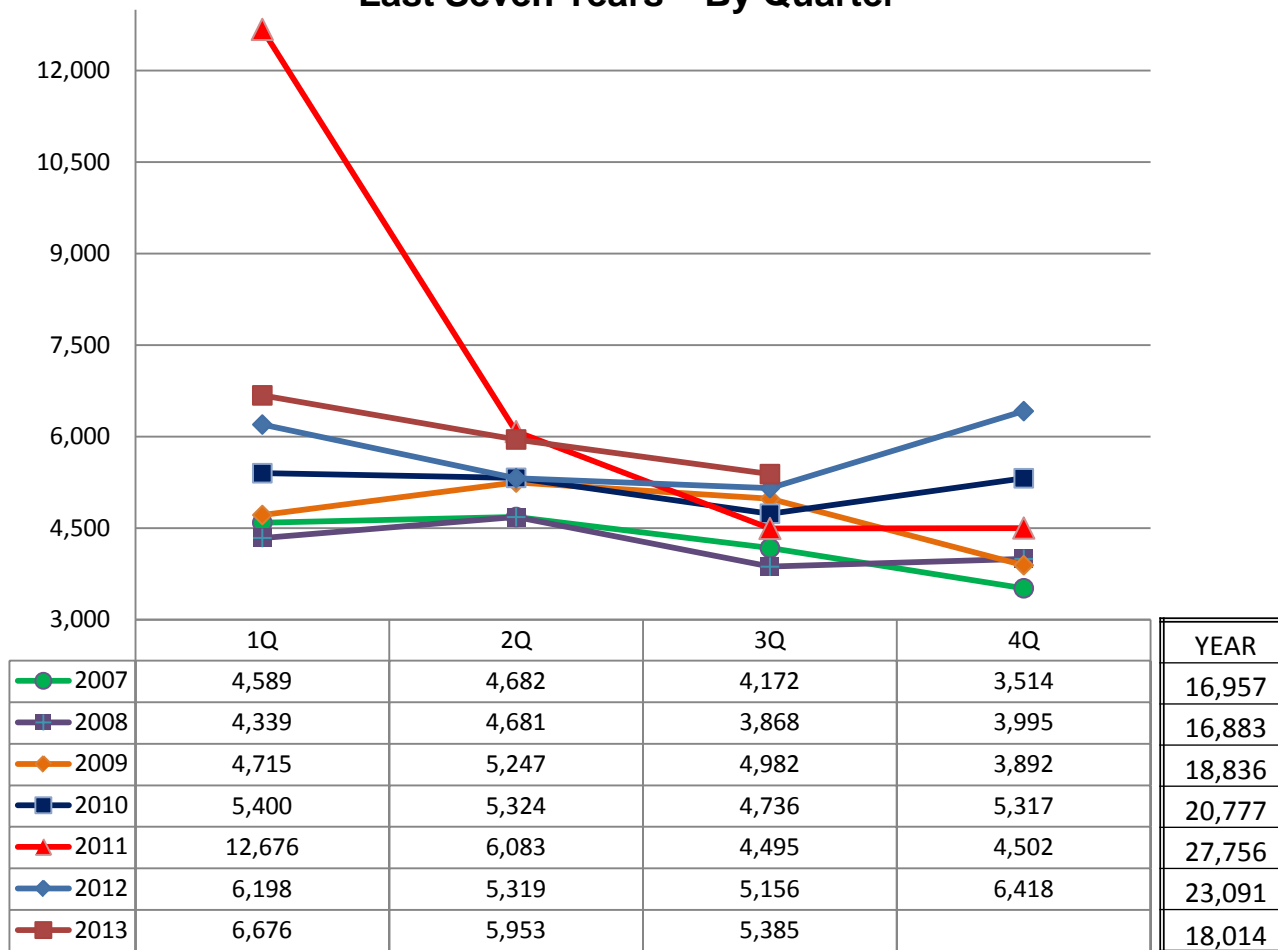


Trends – Retirement Estimates and Applications

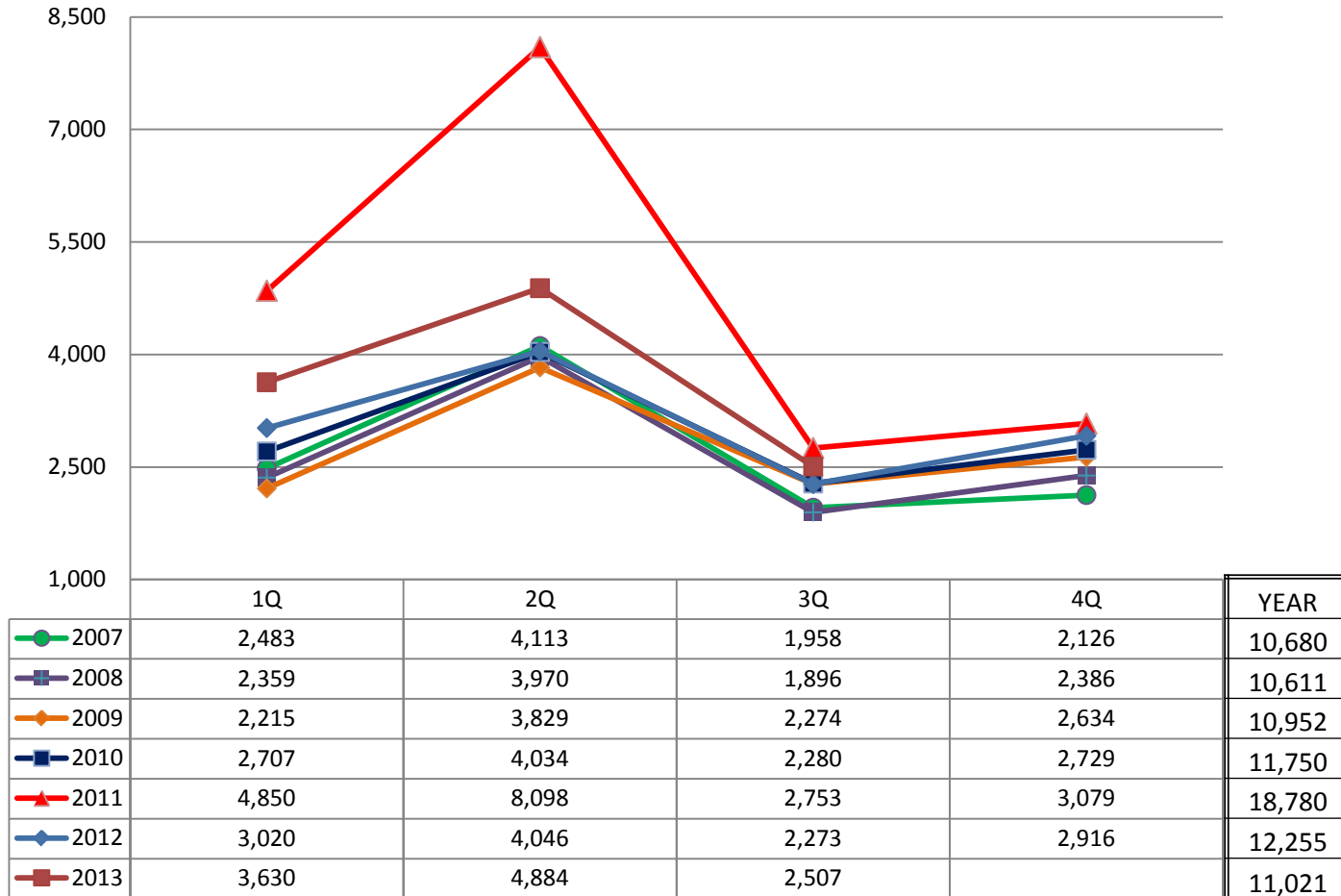
3rd Quarter 2013 Compared to 3rd Quarter 2012



Retirement Estimate Requests Last Seven Years – By Quarter



Retirement Applications Last Seven Years – By Quarter



Questions?