

2016 Annual Disability Statistics

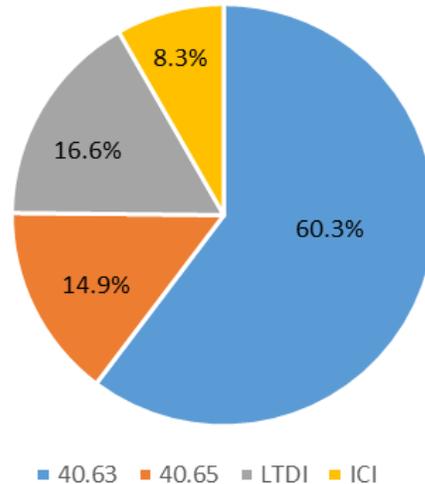
Joint Meeting of the Employee Trust Funds,
Teachers Retirement and Wisconsin Retirement Boards

Deb Roemer, Director
Benefit Services Bureau

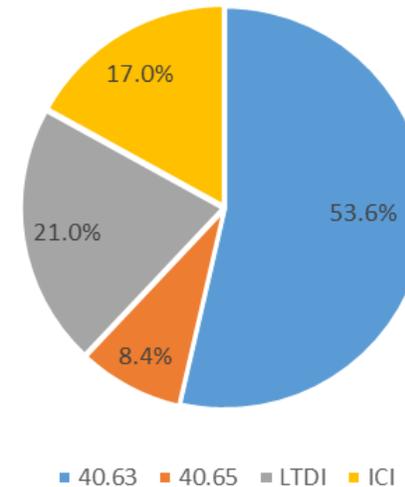


ETF Disability Programs

ETF Disability Programs
2016 Share of Benefit Payments

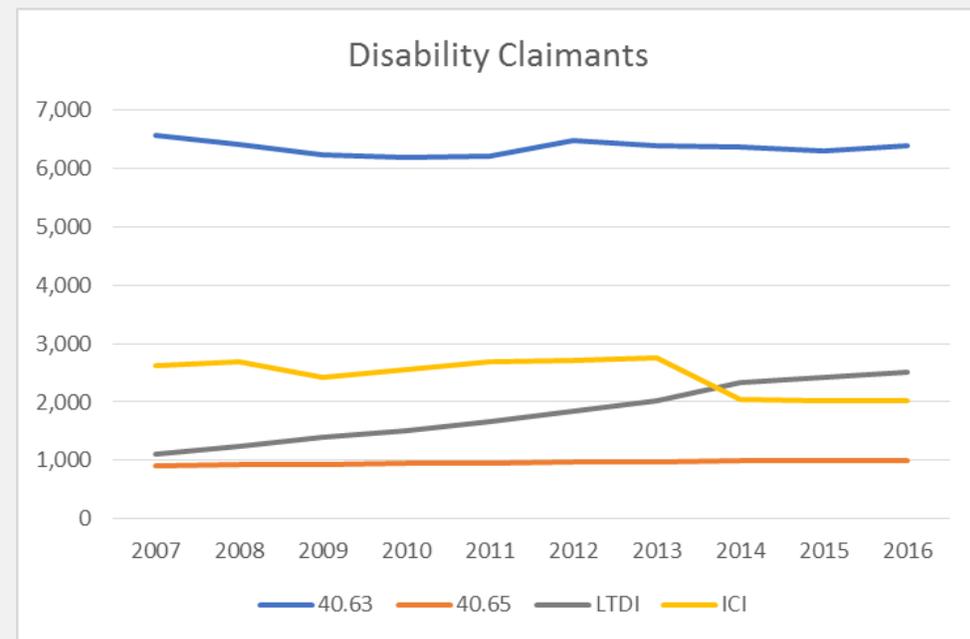
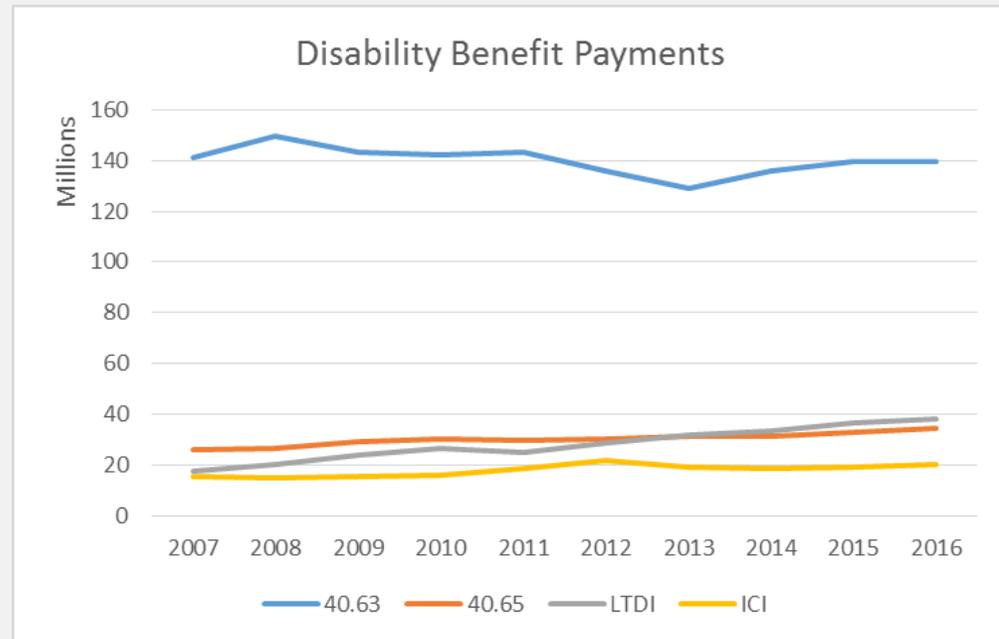


ETF Disability Programs
2016 Percentage of Benefit Recipients



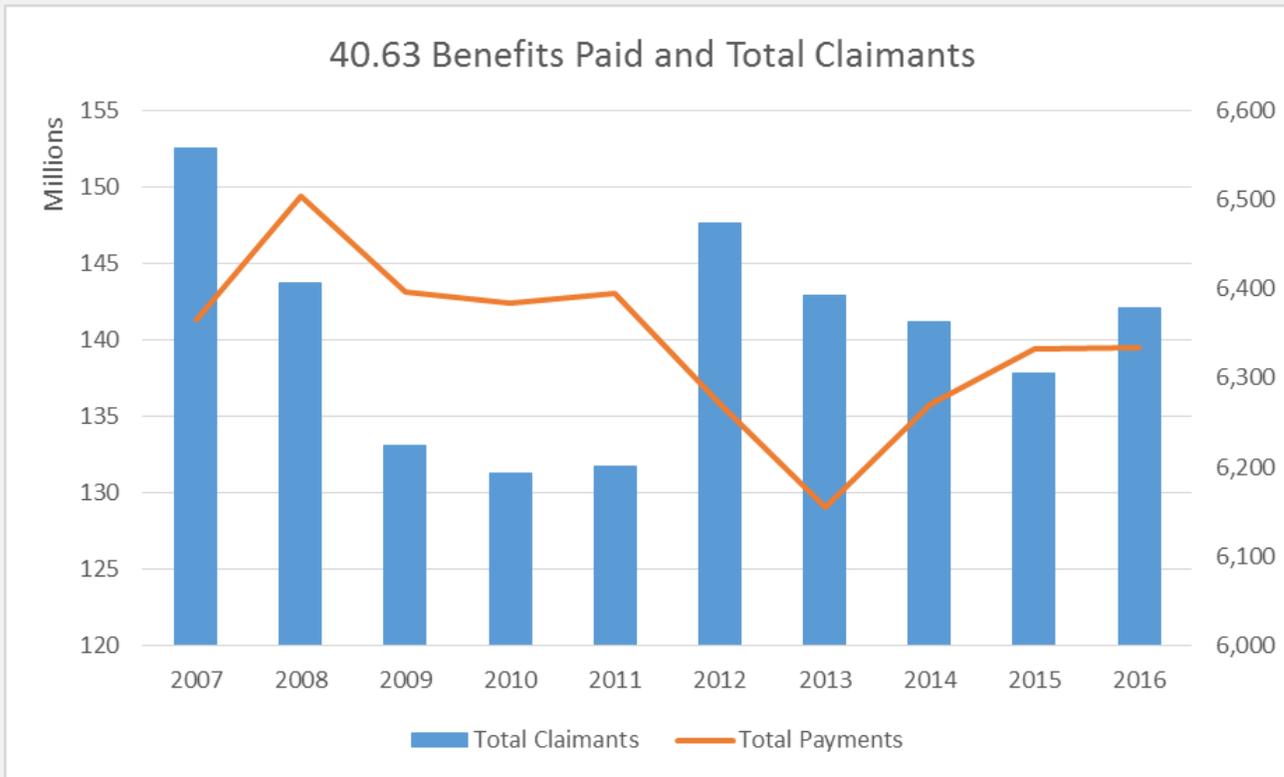
- Four disability programs
 - Disability Annuities, Duty Disability, Long-Term Disability Insurance, Income Continuation Insurance
 - \$231.5 million in annual benefit payments
 - 11,904 separate claims
- Disability Annuity program constitutes more than half of all benefit payments and claims.

ETF Disability Programs



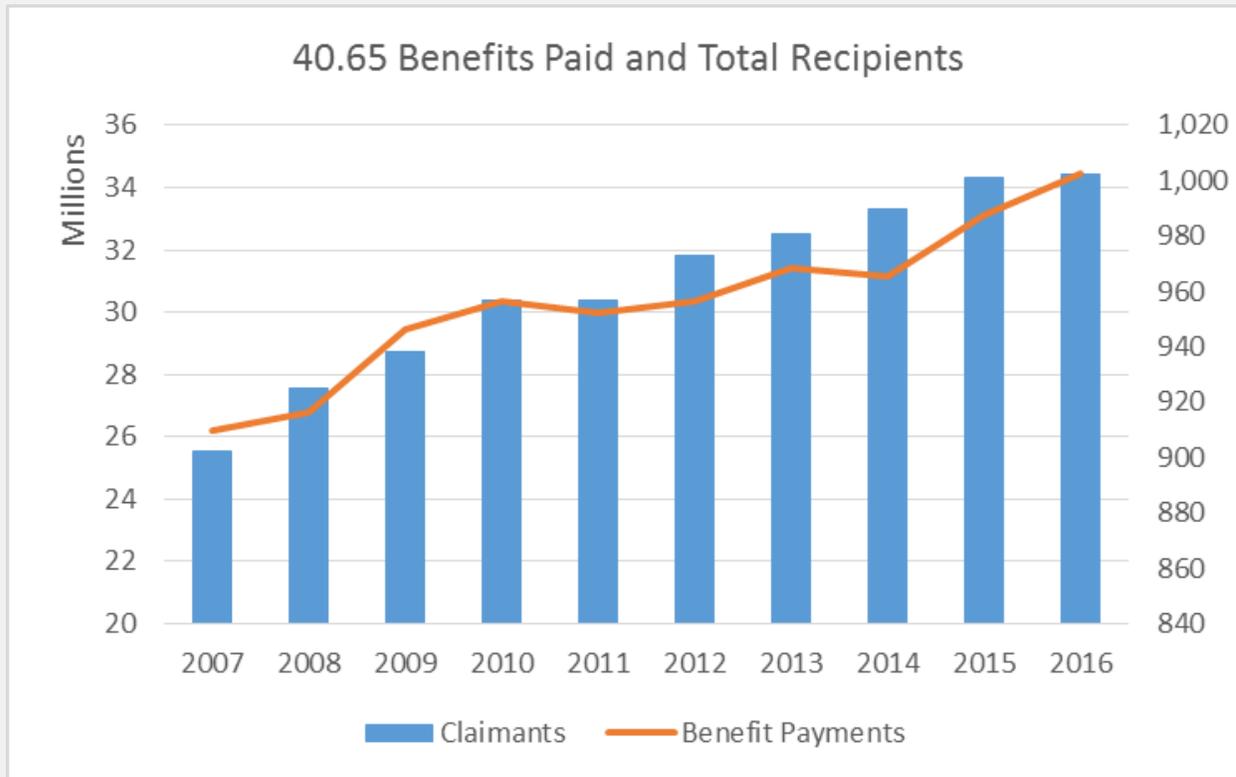
- 40.63 benefit payments and annuitants account for more than other 3 programs combined

40.63 Disability Annuities



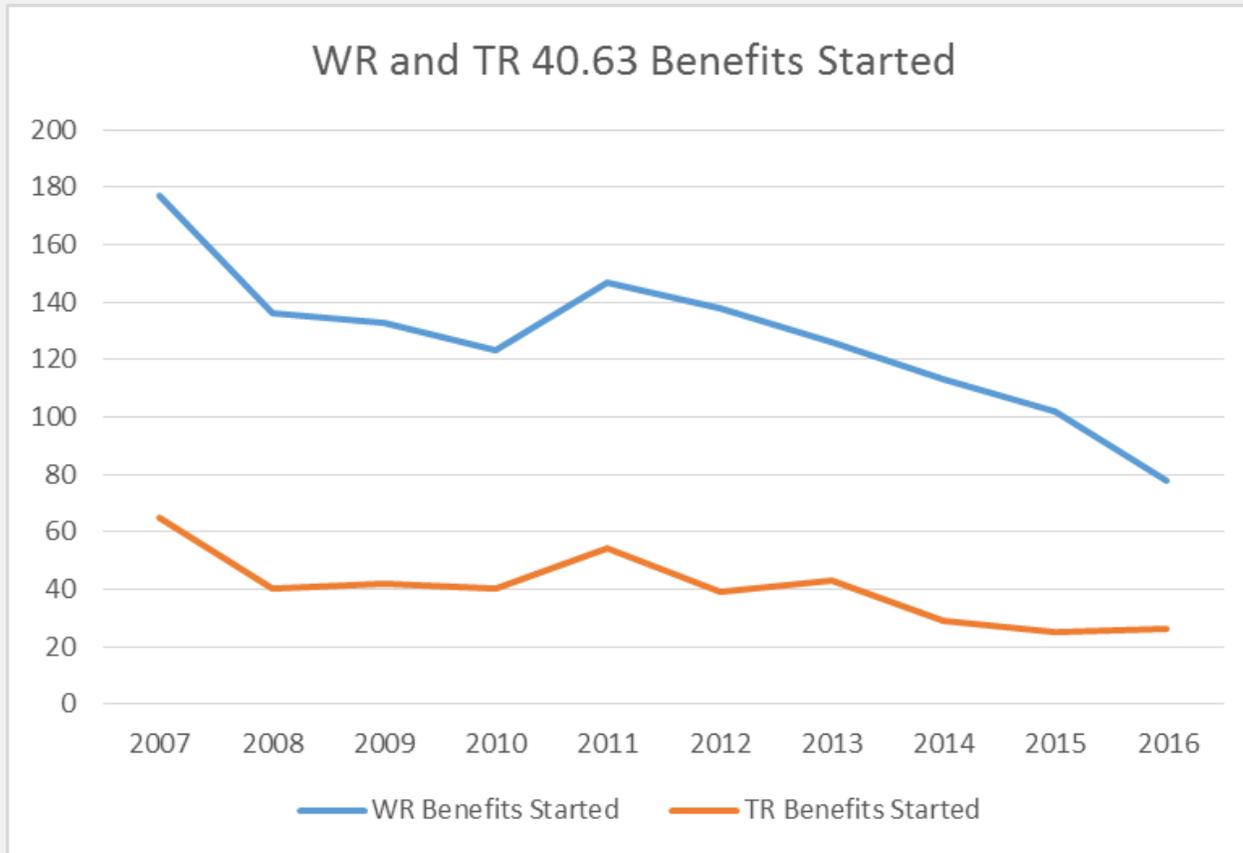
- \$139.5 million in benefit payments
- 6,378 benefit recipients as of December 31, 2016
- 2016 average benefit: \$1,823
 - 1% decrease from 2015
- Benefit payments level off in 2016 after brief period of growth

40.65 Duty Disability



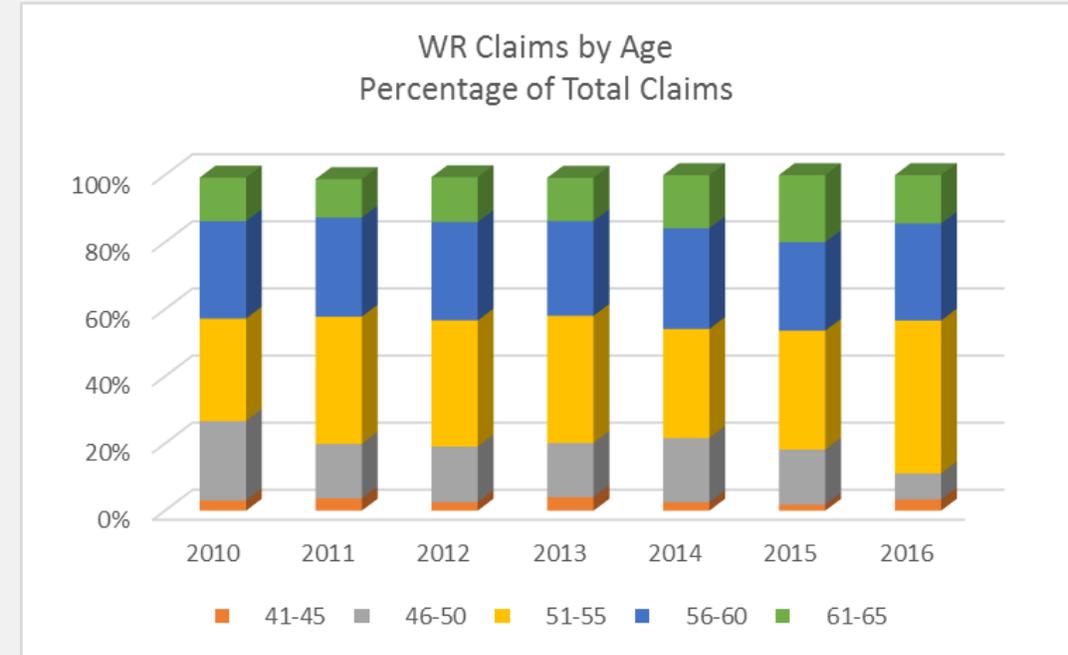
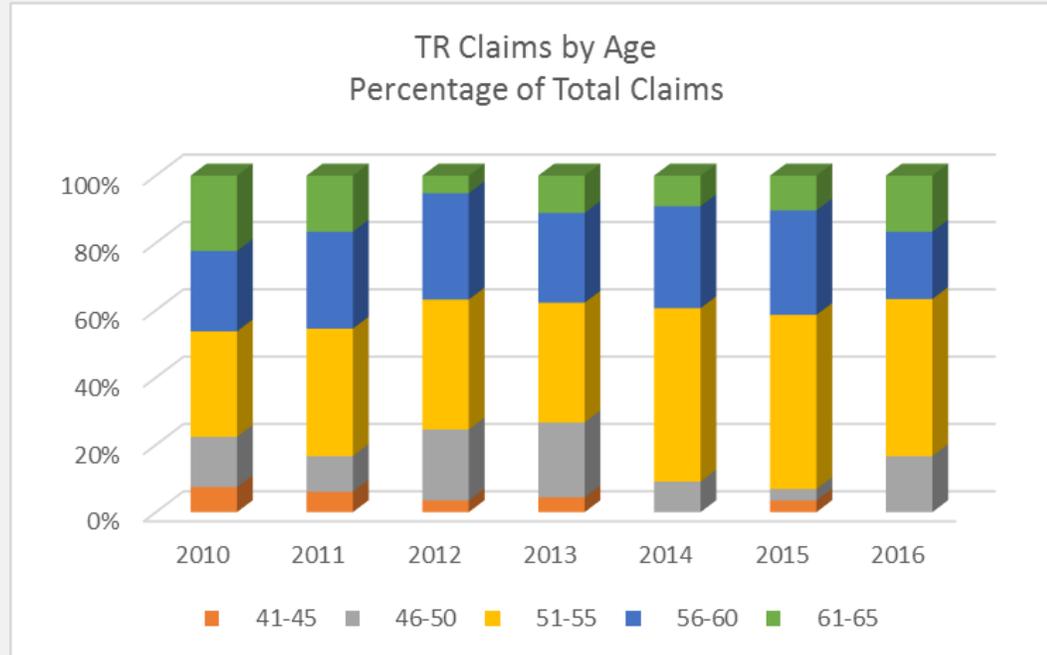
- \$34.5 million in benefit payments
- 1,002 recipients as of December 31, 2016
- 2016 average benefit: \$2,865/month
 - 4% increase from 2015

40.63 Disability Annuities



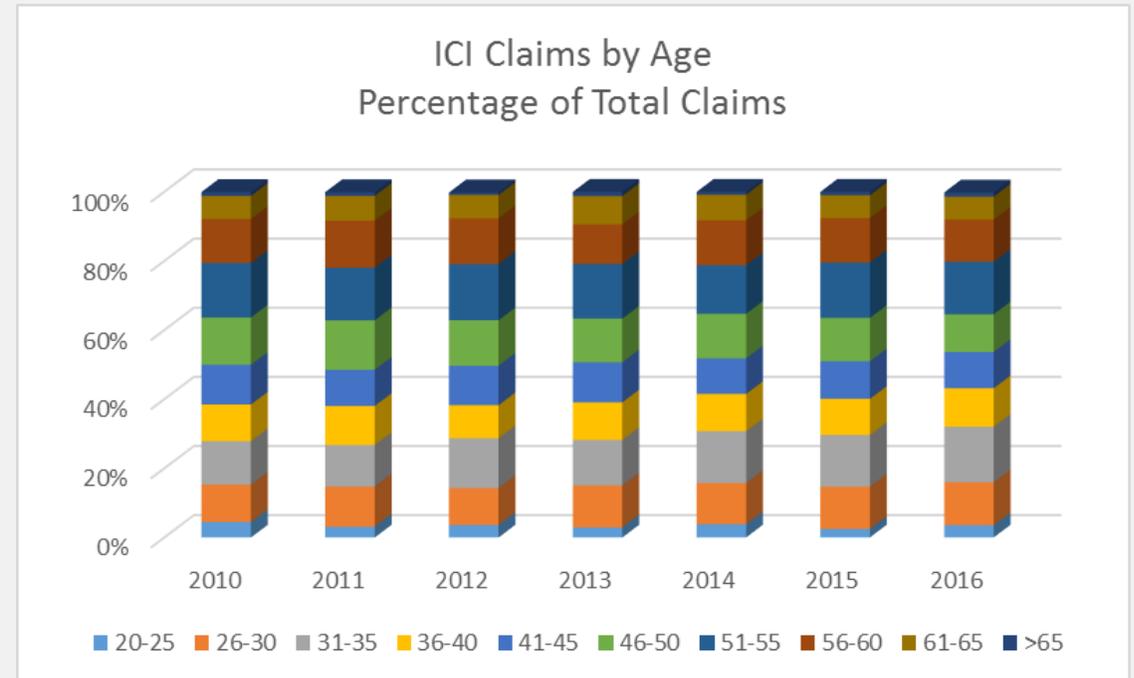
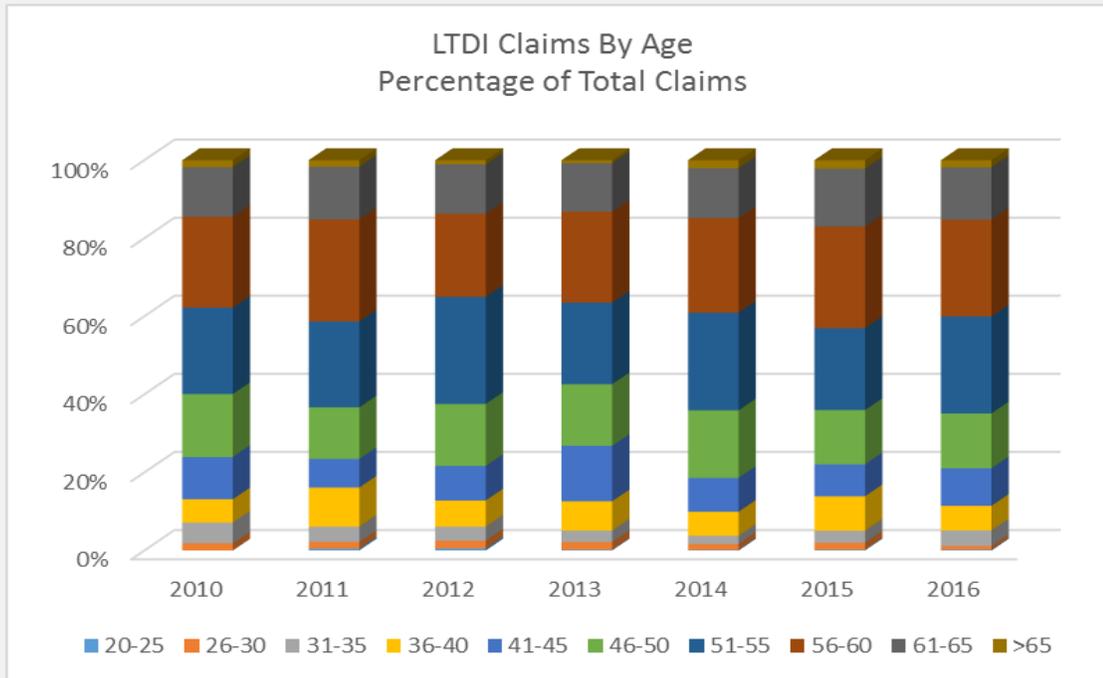
- 104 benefits started in 2016
- Both TR and WR approved benefits continue declining annually due to fewer eligible employees

Disability Claims by Age



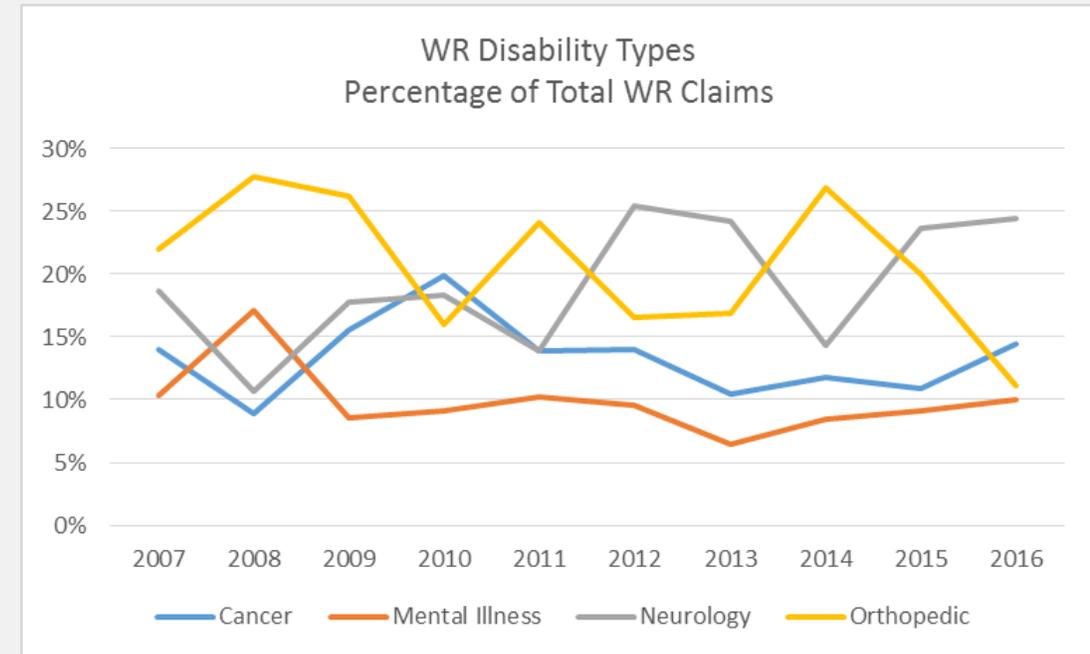
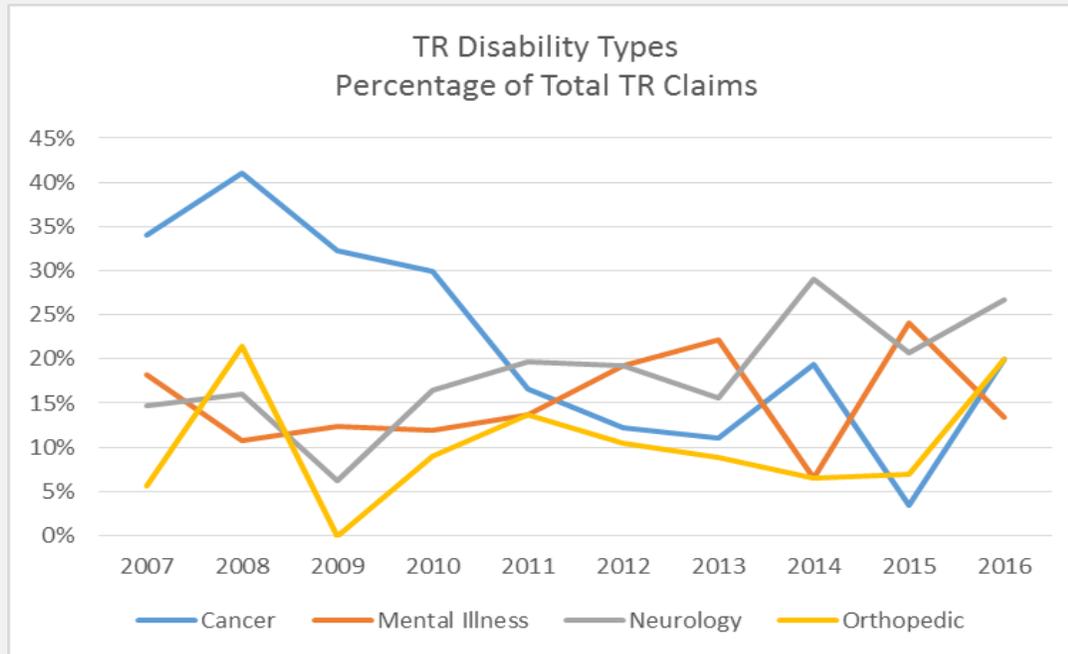
- 40.63 claims are primarily in 51-65 age range
 - 83% of TR claims - 51-65
 - 89% of WR claims - 51-65
 - Younger employees are ineligible for 40.63
 - Approximately 33,000 eligible for 40.63

Disability Claims by Age



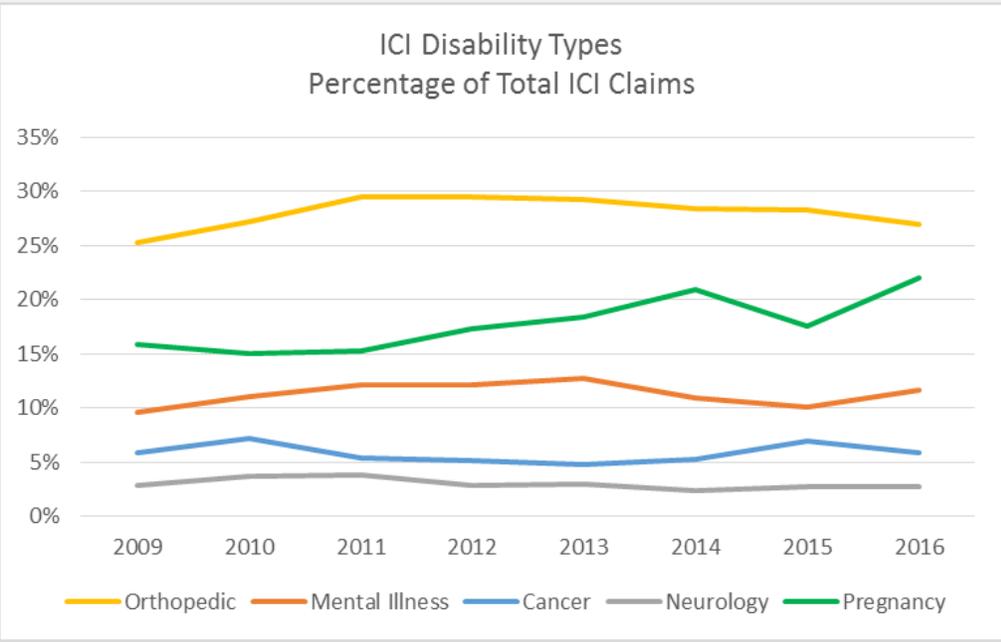
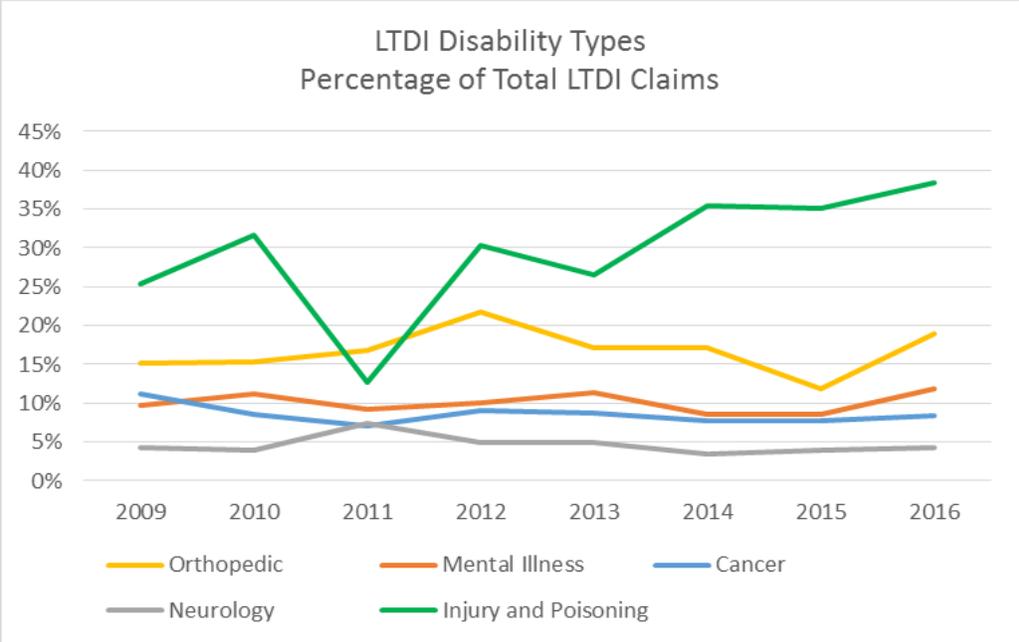
- ICI and LTDI Claims show broader age distribution
- Younger employees and employees with less than 23 years of service cannot receive 40.63 benefits

Disability Types



- Disability types can fluctuate from year to year - Low number of TR claims create volatility
- TR Board Claims
 - Neurology, cancer, and orthopedic claims have increased
 - Mental illness claims decreased in 2016
- WR Board Claims
 - Neurological, cancer, and mental illness claims increased in 2016
 - Orthopedic claims in decline

Disability Types



- Mental illness claims for LTDI and ICI rose slightly in 2016 – 12% of total claims
- Prevalent disability type in LTDI: Injury and Poisoning
- Orthopedic and pregnancy claims account for 49% of ICI claims
 - Indicator of short-term component of ICI



The background is a dark blue gradient with numerous out-of-focus light spots in shades of blue and purple, creating a bokeh effect.

Questions?

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