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Correspondence Memorandum

Date: February 25, 2022

To: Employee Trust Funds Board
 Teachers Retirement Board
 Wisconsin Retirement Board

From: Anne Boudreau, Deputy Administrator
 Division of Retirement Services

Subject: Customer Service Improvements and Trends – 2021 in Review

This memo is for informational purposes only. No Board action is required.

This document provides information about current activities in the Division of Retirement Services, including workload demand, customer use of self-service options, and process improvement projects.

Workload Demand

- **Retirement Estimates, Applications, Annuities Started**


The number of retirement estimate requests and the number of retirement applications both decreased in the fourth quarter in 2021, as compared to the same quarter in 2020.

	2020	2021	Change
Q4			
Retirement Estimates Requested	5,385	5,241	-2.7%
Retirement Applications Received	3,467	3,362	-3.0%
Retirement Annuities Started	1,411	1,496	+6.0%

Comparing the fourth quarter of 2021 to the fourth quarter of 2020, the average turnaround time for a retirement estimate remained the same at six days.

For the calendar year, the volume of retirement estimate requests, retirement applications, and new retirement annuities is lower across the board. This is likely due to the large numbers last year. Some members who planned to retire in 2021 did so instead in 2020.

Reviewed and approved by Matt Stohr, Administrator, Div. of Retirement Services - Electronically Signed 3/8/22



Board	Mtg Date	Item #
JM	03.24.22	4C

	2020	2021	Change
Year			
Retirement Estimates Requested	28,722	25,714	-10.5%
Retirement Applications Received	17,536	15,632	-10.9%
Retirement Annuities Started	10,777	10,564	-2.0%

- **Customer Service - Members**

Call volume was higher in the fourth quarter of 2021 as compared to the same quarter in 2020.

	2020	2021	Change
Q4			
Calls	43,852	44,422	+1.3%
Email	4,582	4,504	-1.7%
Total	48,434	48,926	+1.0%

The average speed of answer in the fourth quarter of 2021 was 2 minutes and 27 seconds, compared to 2 minutes and 22 seconds in the fourth quarter of 2020.

For the calendar year, the volume of calls and email was lower and is likely a result of some members who planned to retire in 2021 did so instead in 2020.

	2020	2021	Change
Year			
Calls	188,697	182,458	-3.3%
Email	20,602	19,239	-6.6%
Total	209,299	201,697	-3.6%

The average speed of answer in the year 2021 was 2 minutes and 30 seconds, compared to 2 minutes and 23 seconds in the 2020.

Process and Customer Service Improvements

- **Secure Outgoing Email**

As mentioned at the last meeting, ETF has been using a system called Box to send and receive documents securely. This allows sharing of board-related documents with you, as well as the exchange of documents with employers and members.

On November 15, ETF started using Box for secure outgoing email to members with certain types of requests. These are the requests that members most frequently ask for a document to be sent by email, often because of a short deadline.

At the last meeting, I reported an issue that made it difficult for members to sign up for Box using a mobile app. Fortunately this issue was rapidly resolved, and ETF began using Box again the first week of January. Members are finding it easy to set up an account and retrieve their documents.

Over the last seven weeks, ETF has sent documents securely to more than 145 members, averaging about 20 such transmissions per week. Members like this service, especially when there is some urgency to receiving their document—such as, an account summary needed for mortgage approval.

- **More Relevant Training for Employers**

ETF has been adding employer training tools to our website over the last few years. At this time of year, we are working with employers to complete annual reconciliation. We provide recorded and live webinars to help employers before annual reconciliation begins, to help them prepare their submissions and to know what to expect. Employers this year are attending or viewing webinars at a much greater rate—with a 30% increase over last year.

At the next meeting I will provide an update on the results of annual reconciliation and share statistics to show the connection between employer training and annual reconciliation.

- **Better Member Communication**

Sometimes the timing of health insurance premium changes can cause an account receivable for a retiree. This is because health insurance premiums are deducted one month in advance. ETF is required to collect underpaid health insurance premiums whereby the department issues an invoice and a letter to the member.

It used to be that the letter and the invoice were mailed separately. The Employer Services Section in the Division of Retirement Services collaborated with the Division of Trust Finance to merge the accounts receivable invoice with the *Account Receivable Underpaid Health Insurance Premiums* letter (form ET-8521A) so that all information is mailed together to the member. Merging the letter and the invoice has reduced calls from members questioning why they received an invoice from ETF.

- **More Member Appointments**

ETF has been seeing more demand for member retirement sessions. During this time of year, many teachers are making contract decisions. To assist with their decision, they are ordering retirement estimates and scheduling appointments.

The Member Services Bureau monitors customer service demand for retirement estimates and appointments and has increased one-on-one appointment capacity by more than 30% over the last six weeks. This translates to adding more than 200 appointments on top of what was already provided.

This demand is something we will be watching. At the next board meeting, I will provide an update and any available statistics.

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