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## *Correspondence Memorandum*

**Date:** May 29, 2024

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

**From:** Anne Boudreau, Deputy Administrator  
 Division of Benefits Administration

**Subject:** Customer Service Member and Employer Data, 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 and employer workload demand, process improvements, and trends.

### **Workload Demand**

Retirement Estimates, Applications, Annuities Started, Lump-Sum Benefits  
 Comparing the first quarter of 2024 to that same quarter in 2023, the number of retirement estimate requests, new retirement annuities, and retirement lump-sum benefits all decreased while the number of retirement applications increased.

	Q1 2023	Q1 2024	Change (%)
Retirement Estimates Requested	6,755	6,738	-0.3%
Retirement Applications Received	2,732	3,209	17.5%
Retirement Annuities Started	2,288	2,260	-0.3%
Retirement Lump Sums Paid	476	616	-29.4%

Comparing the first quarter of 2024 to the first quarter of 2023, the average turnaround time for a retirement estimate increased from 4.5 days in 2023 to 6.7 days in 2024.

### Customer Service – Members

Call volume decreased in the first quarter of 2024 as compared to the same quarter in 2023.

Board	Mtg Date	Item #
JM	06.20.24	4B

	Q1 2023	Q1 2024	Change (%)
Calls	54,581	51,116	-6.3%
Email	6,182	5,843	-5.5%
Total	60,763	56,959	-6.1%

The average speed of answer in the first quarter of 2024 was 1 minute, 47 seconds, compared to 6 minutes, 16 seconds in the first quarter of 2023. This improved speed was primarily due to lower call volume. In the first quarter of 2023 we changed the way withholding was computed to align with federal requirements ahead of the required implementation of the W-4P withholding form. The resulting mailers, followed by changes to federal tax tables, caused a significant increase in calls in 2023.

### Service Levels

In terms of service level goals, we are not meeting these for retirement applications or for appointments.

For applications, our goal is to process 90% within one week after we have all necessary information, such as the employer's final report with earnings and termination date. For the first quarter, we were at 88%. This is close to the SLA goal; however, we fell short due to the high number of teacher retirements this time of year.

For appointments, despite adding additional member appointments on our calendar, we are averaging 34 days before a member can get an appointment (virtually or in person, individual or group).

### **Customer Service and Process Improvements**

#### Jailers Law Implementation

During the last quarter's board meeting, we provided preliminary data regarding the number of members who are working as jailers and who had elected to be classified as protective or general category employees following the implementation of 2023 Wisconsin Act 4. These members had the first 60 days of the year within which to make an election.

The final numbers are 664 members electing the protective employment category, and 1,257 members electing the general category employment category.

#### Annual Reconciliation

Between January 1 and April 15 each year, ETF reconciles data that employers submitted for their employees for the previous year. Each member account is reconciled to ensure all contributions have been paid and the appropriate service and earnings have been credited. If there are data discrepancies, ETF contacts the employer and assists in identification and resolution. This process is a prerequisite to generating the Annual Statements of Benefits, which is one of the most important ways ETF currently shares WRS information with members each year. The Employer Services Section

successfully completed annual reconciliation for 2023 — virtually, ahead of schedule, and without any overtime hours for staff.

Staff reconciled the data of 1,639 WRS employers and more than 260,000 active WRS employees. Similar to last year, a large number of employer accounts arrived in balance — needing no intervention by ETF staff. The high rate of employer accuracy and the correspondingly boost to ETF staff efficiency are attributable to more time dedicated to employer training (provided in person and via webinars), monthly training reminders for employers, updates to ETF's online reporting system, increased targeted in-house queries to locate reporting anomalies, diligent follow up and case management, and employer compliance reviews.

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