


**AGENDA AND NOTICE OF MEETING
STATE OF WISCONSIN
TEACHERS RETIREMENT BOARD**

**Thursday, June 26, 2008
1:00 p.m.
Holiday Inn Hotel and Suites
1109 Fourier Drive
Madison, Wisconsin**

Documents for this meeting are available on-line at:
http://etf.wi.gov/boards/board_tr.htm
To request a printed copy of any of the agenda items, please contact
Ann McCarthy, at (608) 261-0736.

 *Denotes action item*

- | | | |
|-----------|---|--|
| 1:00 p.m. |  | 1. Consideration of Minutes of Previous Meeting |
| 1:05 p.m. | | 2. Announcements |
| 1:10 p.m. | | 3. Operational Updates <ul style="list-style-type: none">• 2008 Board Roster• Disability Report• Miscellaneous<ul style="list-style-type: none">➤ Future Items for Discussion |
| 1:25 p.m. | | 4. Adjournment |

Times shown are estimates only.

The meeting location is handicap accessible. If you need other special accommodations due to a disability, please contact Ann McCarthy, Department of Employee Trust Funds, P.O. Box 7931, Madison, WI 53707-7931. Telephone: (608) 261-0736. Wisconsin Relay Service 7-1-1. E-mail: ann.mccarthy@etf.state.wi.us

MINUTES OF MEETING
STATE OF WISCONSIN
TEACHERS RETIREMENT BOARD

Thursday, March 13, 2008

Holiday Inn Hotel and Suites
1109 Fourier Drive
Madison, Wisconsin

BOARD PRESENT:

Wayne McCaffery, Chair
Lon Mishler, Vice-Chair
Dennis Panicucci, Secretary
Ted Bratanow
Mike Langyel
Dan Nerad
Tom Pedersen
Patrick Phair
Roberta Rasmus
Robin Starck
David Wiltgen

BOARD NOT PRESENT:

Steve Scheible
Robert Shaw

PARTICIPATING ETF STAFF:

Bob Conlin, Deputy Secretary
Lisa Ellinger, Deputy Administrator, Division of Insurance Services
Sari King, Administrator, Division of Retirement Services
Diane Poole, Director, Disability Programs Bureau
Rob Weber, Chief Legal Counsel
Ann McCarthy, Board Liaison

OTHERS PRESENT:

Anne Boudreau, Division of Retirement Services
Rhonda Dunn, Executive Assistant
Jean Gilding, Division of Retirement Services
Linda Owen, Division of Retirement Services
Deb Roemer, Division of Insurance Services
Matt Stohr, Director, Legislation, Communications, and Planning
Sharon Walk, Division of Management Services
Marilyn Wigdahl, Chair, WR Board and Chair, ETF Board

Wayne McCaffery, Chair, called the meeting of the Teachers Retirement Board (Board) to order at 1:05 p.m.

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CONSIDERATION OF MINUTES

Motion: Mr. Bratanow moved approval of the minutes of the December 13, 2007, meeting as submitted by the Board Liaison. Mr. Nerad seconded the motion, which passed without objection on a voice vote.

ELECTION COMMITTEE

Ms. King announced that the Election Committee certified the election results prior to the start of the Board meetings. She announced that the return rate of ballots was 32% for the annuitant teacher election and 13% for the technical college teacher election.

Ms. King advised the Board that Lon Mishler, was re-elected to his seat as the annuitant teacher representative, and that Tom Pedersen, was re-elected to his seat as the technical college teacher representative. Ms. King extended congratulations to Mr. Mishler and Mr. Pedersen.

ELECTION OF OFFICERS

Ms. King requested the action of the Board regarding the election of officers. A memorandum was provided to the Board, which included a list of current officers as well as a current Board member roster.

- CHAIR

Nomination: Mr. Bratanow nominated Lon Mishler to serve a one-year term as Chair of the Teachers Retirement Board. Mr. Panicucci seconded the nomination.

Motion: Hearing no further nominations, Mr. Langyel moved to close nominations and cast a unanimous ballot to elect Lon Mishler as Chair of the Teachers Retirement Board for a one-year term. Mr. Nerad seconded the motion, which passed without objection on a voice vote.

- VICE-CHAIR

Nomination: Mr. Bratanow nominated Dennis Panicucci to serve a one-year term as Vice-Chair of the Teachers Retirement Board. Mr. Wiltgen seconded the nomination.

Motion: Hearing no further nominations, Mr. Langyel moved to close nominations and cast a unanimous ballot to elect Dennis Panicucci to serve as Vice-Chair of the Teachers Retirement Board for a one-year term. Mr. Nerad seconded the motion, which passed without objection on a voice vote.

- SECRETARY

Nomination: Mr. Bratanow nominated Robin Starck to serve a one-year term as Secretary of the Teachers Retirement Board. Mr. Panicucci seconded the nomination.

Motion: Hearing no further nominations, Mr. Langyel moved to close nominations and cast a unanimous ballot to elect Robin Starck to serve a one-year term as Secretary of the Teachers Retirement Board. Mr. Nerad seconded the motion, which passed without objection on a voice vote.

David Wiltgen left the meeting at 1:13 p.m.

DISABILITY STATISTICS SUMMARY

Quarterly Report October 2007-December 2007 Lisa Ellinger, Deputy Administrator and Diane Poole, Disability Programs Director of the Division of Insurance Services referred the Board to the provided report.

Annual Report 2007 Ms. Poole briefed the Board on the annual report. In 2007, the Department completed disability benefit estimates for 771 participants, 242 disability benefit annuities were started, and 21 duty disability benefits were initiated. The Department approved 81.4% of the disability applications submitted. Of the annuities started, 54% were for females and 46% were for males. Ms. Poole explained that 30.4% of the disability applications were for participants aged 51-55 years. The most common disability causes in 2007 were orthopedic, neurology, and cancer.

CONSIDERATION OF ADMINISTRATIVE RULE

Mr. Weber discussed Clearinghouse Rule 07-062, regarding purchase of service credit under the Wisconsin Retirement System (WRS) with the Board. He provided the final draft report on this rule and explained that this rule brings together the Department regulations on purchased service into a single section of the Administrative Code. Mr. Weber explained that this rule has been revised since last presented to the Board to reflect current legislation and policy changes. He noted that the Group Insurance Board has already approved this report.

Motion: Mr. Nerad moved approval of the final draft report on Clearinghouse Rule 07-062. Ms. Rasmus seconded the motion, which passed without objection on a voice vote.

BOARD MEMBER CRITERIA

Mr. Conlin discussed the memo provided to the Board and indicated that it was requested by the Board in the context of examining the Board's diversity. The Board members consist of

elected members and Governor appointees. Wisconsin State statutes determine each individual Board seat criterion. There was no further discussion.

MISCELLANEOUS

Items for Future Discussion The Board members expressed interest in the Variable fund, Department contact information for member questions, and more legislation updates between Board meetings.

ADJOURNMENT

Motion: Mr. Starck moved adjournment. Mr. Phair seconded the motion, which passed without objection on a voice vote.

The meeting of the Teachers Retirement Board adjourned at 1:46 p.m.

Date Approved: _____

Signed: _____

Robin Starck, Secretary
Teachers Retirement Board

**MINUTES OF MEETING
STATE OF WISCONSIN**

**TEACHERS RETIREMENT BOARD
ELECTION COMMITTEE
Thursday, March 13, 2008**

**Holiday Inn Hotel and Suites
1109 Fourier Drive
Madison, Wisconsin**

COMMITTEE PARTICIPATING: Dennis Panicucci
Robin Starck

STAFF PRESENT: Nancy Ketterhagen, Election Coordinator
Ann McCarthy, Board Liaison

The Election Committee was called to order at 8:15 a.m. Ms. Ketterhagen called for a nomination of chair for the Teachers Retirement Board Election Committee (Committee).

Robin Starck nominated Dennis Panicucci to act as chair of the Committee. No other nominations being made and no objections being heard, Mr. Panicucci was elected as chair. Mr. Panicucci reported that the Committee would certify the results for the Teachers Retirement Board elections for the annuitant and technical college teacher members.

ACTIONS

Committee Review of Invalid Ballots Ms. Ketterhagen referred to the Department's criteria on page two of the University of Wisconsin Survey Center (UWSC) *Report to Election Committee* regarding the explanation of ballots declared invalid.

MOTION: Mr. Starck moved, under the criteria set forth, to deem two hundred and forty ballots invalid for the annuitant teacher election. Mr. Panicucci seconded the motion, which passed unanimously on a voice vote.

MOTION: Mr. Panicucci moved, under the criteria set forth, to deem five ballots invalid for the technical college teacher election. Mr. Starck seconded the motion, which passed unanimously on a voice vote.

Election Certification Ms. Ketterhagen noted that there were two seats open on the Teachers Retirement Board, the first, for an annuitant teacher who was formerly a teacher participant in the Wisconsin Retirement System (WRS) under Wis. Stats. § 15.165 (3) (a) 6, to be elected by annuitant members meeting the same criteria. The vote totals by candidate are: Lon Mishler, 8,585 votes; Linda Kassera, 3,795 votes; Terry J. Olson, 2,112 votes; Carl Munson, 1,805 votes; Robert Kulhanek, 1,374 votes; and Grant Tews, 1,317 votes.

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The second seat, for a technical college teacher participant, must be a teacher participant from a Wisconsin Technical College district and a participating employee in the WRS under Wis. Stats. § 15.165 (3) (a) 2, to be elected by participating members meeting the same criteria. The vote totals by candidate are: R. Thomas Pedersen, 440 votes; and Tanvir Kahn, 278 votes.

MOTION: Mr. Starck moved to certify and accept the Report to Election Committee. Mr. Panicucci seconded the motion, which passed unanimously on a voice vote.

Discussion Ms. Ketterhagen indicated that the election results would be reported at the Teachers Retirement Board meeting later in the day. The candidates will be notified following that announcement.

ADJOURNMENT

MOTION: Mr. Panicucci moved adjournment. Mr. Starck seconded the motion, which passed unanimously.

The Teachers Retirement Board Election Committee adjourned at 8:25 a.m.

Ann McCarthy, Board Liaison

2008

TEACHERS RETIREMENT BOARD

MEMBERSHIP ROSTER

MEMBER NAME	TERM BEGAN	TERM EXPIRES	MEMBERSHIP REQUIREMENTS
Langyel Michael	5/1/05	5/1/10	§ 15.165 (3)(a)7 Elected by Milwaukee public school teachers who are participants City of Milwaukee teacher who is a participant in WRS 5-year term
McCaffery Wayne	5/1/04 (5/89-5/94) (5/94-5/99) (5/99-5/04)	5/1/09	§ 15.165 (3)(a)1 Elected by public school teachers Public school teacher 5-year term
Mishler (C) Lon	5/1/08 (5/03-5/08)	5/1/13	§ 15.165 (3)(a) 6 Elected by annuitants who were teacher participants Annuitant who was a teacher participant in WRS 5-year term
Nerad Dan	10/6/04	5/1/08	§ 15.165 (3)(a)3 Appointed by Governor Public school administrator who is not a classroom teacher 5-year term
Panicucci (V) Dennis	5/1/04	5/1/09	§ 15.165 (3)(a)1 Elected by public school teachers Public school teacher 5-year term
Pedersen R. Thomas	5/1/08 (5/03-5/08)	5/1/13	§ 15.165 (3)(a)2 Elected by participating Wisconsin Technical College teachers Public school teacher from a participating Wisconsin Technical College district and a participating employee in WRS 5-year term
Phair Patrick	5/1/06	5/1/11	§ 15.165 (3)(a)1 Elected by public school teachers Public school teacher 5-year term
Rasmus Roberta	9/23/04	5/1/08	§ 15.165 (3)(a) 5 Appointed by Governor Member of a school board 5-year term
Scheible Steven	5/1/07	5/1/12	§ 15.165(3)(a)1 Elected by public school teachers Public school teacher 5-year term
Shaw Robert	5/1/04	5/1/09	§ 15.165 (3)(a)4 Appointed by Governor UW teacher participant in WRS (not from same campus as other UW teacher participant) 5-year term
Starck (S) Robin	5/1/06	5/1/11	§ 15.165 (3)(a)1 Elected by public school teachers Public school teacher 5-year term
*Vacant (Bratanow)			§ 15.165 (3)(a)4 Appointed by Governor UW teacher participant in WRS (not from same campus as other UW teacher representative) 5-year term
Wiltgen David	5/1/07 (5/02-5/07)	5/1/12	§ 15.165 (3)(a)1 Elected by public school teachers Public school teacher 5-year term

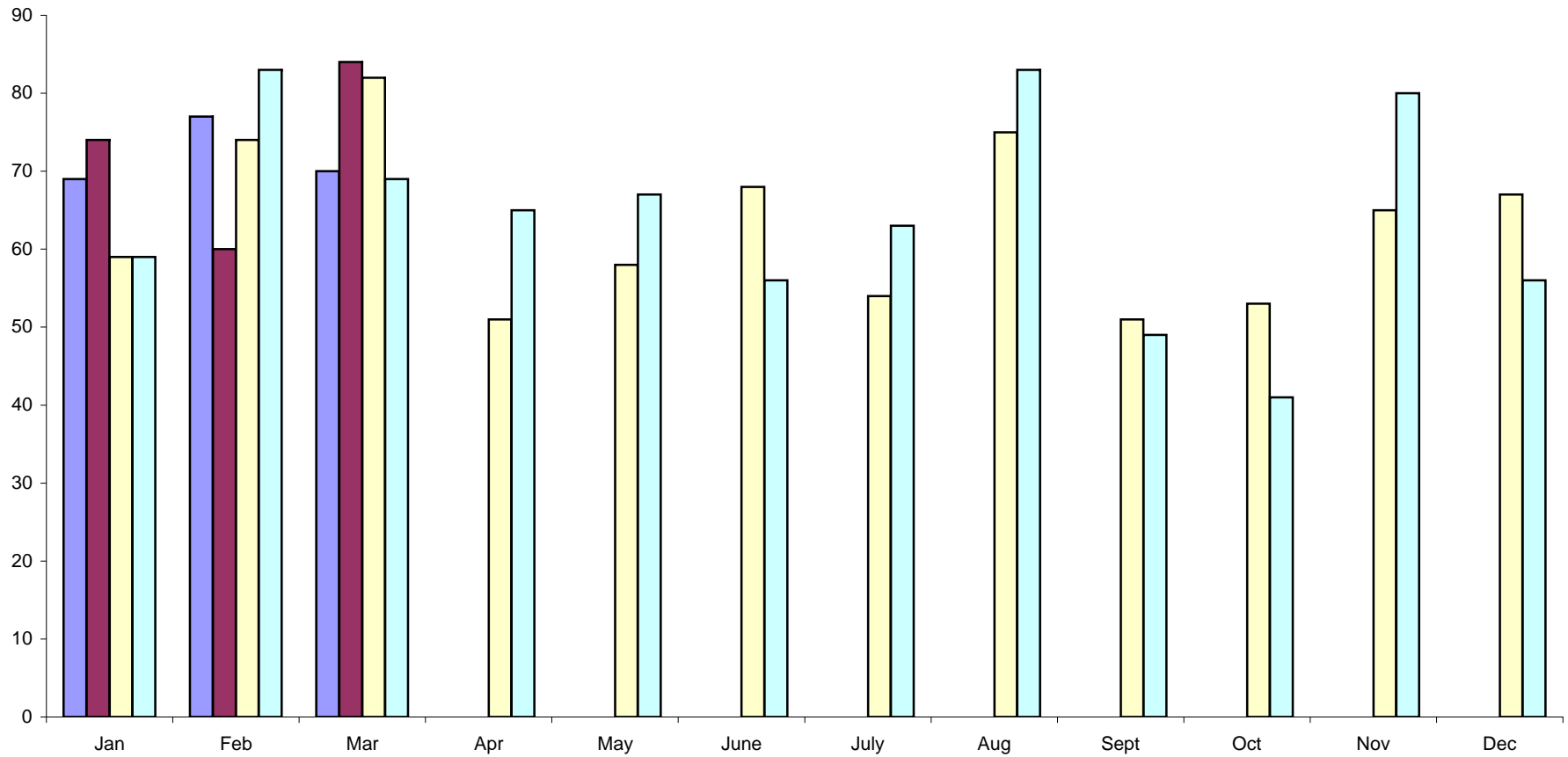
*Bratanow resigned from the Board March 2007. A replacement has not yet been appointed.

(C) – Chair (V) – Vice-Chair (S) – Secretary

MAILINGS FOR BOARD MEMBERS SHOULD BE SENT TO:

Teachers Retirement Board
c/o Ann McCarthy, Board Liaison
Department of Employee Trust Funds
PO Box 7931
Madison WI 53707-7931
Phone (608) 261-0736

2008 v. 2007 Disability Estimates Requested and Completed



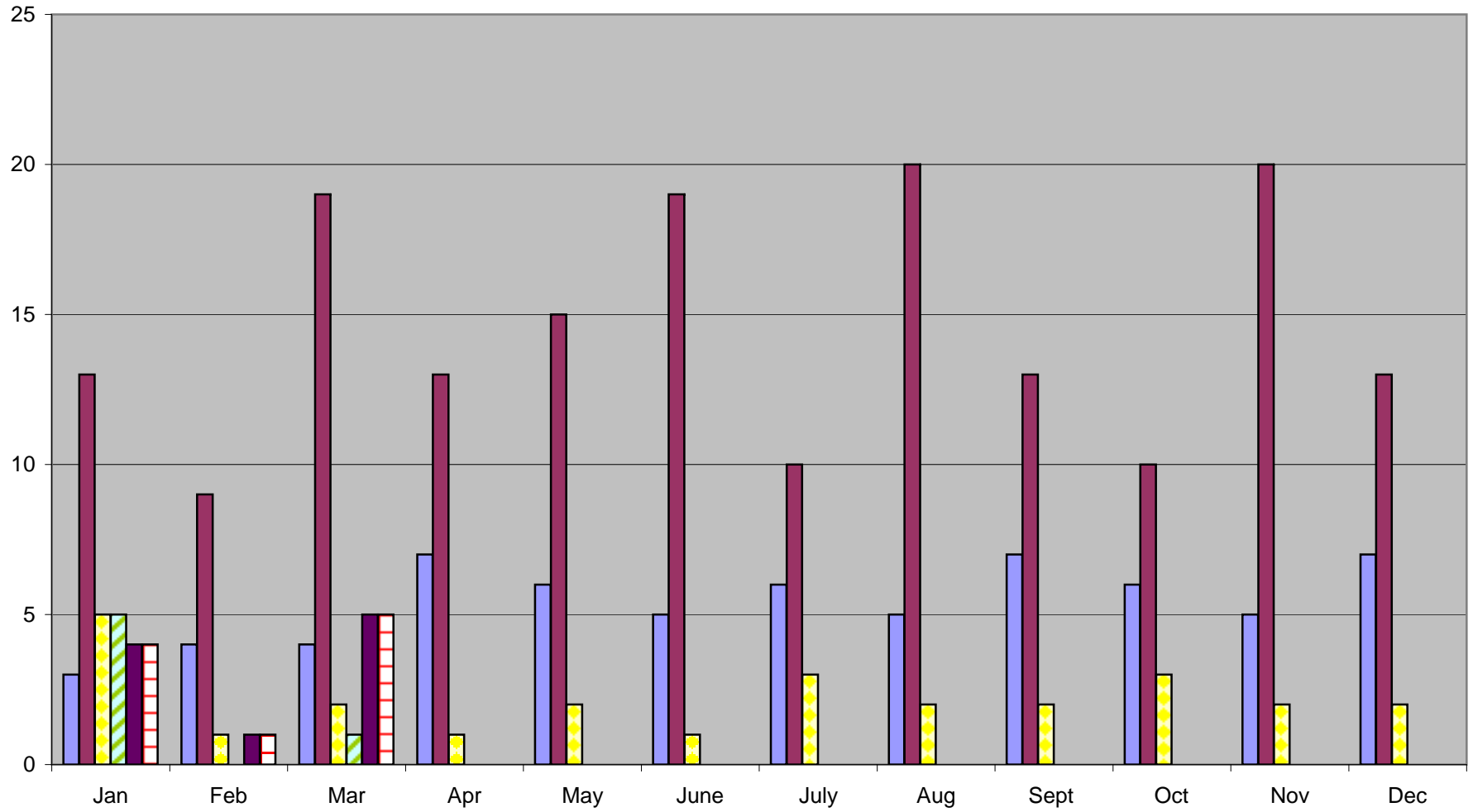
■ 2008 Disability Est. Requested

■ 2008 Disability Est. Completed

■ 2007 Disability Est. Requested

■ 2007 Disability Est. Completed

Disability Annuities Started 2007 v. 2008



■ 2007 Teachers Retirement Board s. 40.63	■ 2007 Wisconsin Retirement Board s. 40.63	■ 2007 s. 40.65 Duty Disability
■ 2008 Teachers Retirement Board s. 40.63	■ 2008 Wisconsin Retirement Board s. 40.63	■ 2008 s. 40.65 Duty Disability

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS**

**WISCONSIN RETIREMENT SYSTEM (WRS)
DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
JANUARY - MARCH 2008**

This report provides a summary of disability information for the Board's review. Department staff have reviewed and made the following recommendations on initial disability applications submitted by participants. Staff review individual participant applications on an ongoing basis to determine if disability benefits can continue. If you have questions or would like additional information regarding disability benefits, please contact Diane Poole at (608) 266-5387 or diane.poole@etf.state.wi.us.

The following key describes the type of disability determinations made by ETF staff:

Approved – Disability applications that meet the service, medical and employer criteria required under §40.63 (1) and (4), Wis. Stats., are approved and processed for benefit payments.

Cancelled – Disability applications that are incomplete within one year after the Department receives the disability application are cancelled. Applications are considered incomplete if the Department has not received the required medical certification and/or employer statement.

Deemed Approved – Disability applications are deemed approved if the applicant meets the service requirement and the Department receives a valid disability application and one *Medical Report* certifying the applicant's disability prior to the applicant's death. The employer is also required to submit an Employer Statement.

Denial – Disability applications are denied if the applicant does not meet all of the statutory requirements (service, medical and employer statement).

Denial Rescinded: Approved – Disability applications that were initially denied because the applicant did not meet the statutory requirements. The denial has since been overturned and the application approved due to receipt of additional information or as determined by the appropriate Board.

Termed – Disability applications that were initially approved and benefit payments made may be terminated if the Department receives information from a physician certifying that the individual no longer meets the medical definition for a disability or the individual does not comply with requests for medical or financial information.

Termed Rescinded: Approved – Disability applications that were initially approved, but the annual medical recertification was completed indicating that the individual was no longer disabled or the individual did not comply with medical or financial requests. The termination may be rescinded upon receipt of a certifying medical report, financial information, or based on an appeal determination.

Withdrawn/Void/Invalid – Disability applications are withdrawn at the request of the applicant. This occurs most often when an applicant returns to active employment and no longer meets the statutory requirements for a disability benefit.

§. 40.63 Waiver – Disability application is submitted and there is a Long-Term Disability Insurance (LTDI) election form that waives all rights to benefits under Wisconsin statutes §. 40.63 for a WRS disability retirement benefit.

WRS DISABILITY BENEFITS				
	Jan	Feb	Mar	Total
Disability Estimates Requested	69	77	70	216
Disability Estimates Completed	74	60	84	218
Disability Annuities Started (on payroll)				
Teachers Retirement Board §. 40.63	5	0	1	6
Wisconsin Retirement Board §. 40.63	13	8	18	39
§. 40.65 Duty Disability (WR Board)	4	1	5	10
Total Annuities Started	22	9	24	55

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS**

**WISCONSIN RETIREMENT SYSTEM (WRS)
DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
JANUARY - MARCH 2008**

TEACHERS BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED				
Option	Jan	Feb	Mar	Total
100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed	1	0	0	1
Life Annuity with 60 Payments Guaranteed For Annuitant's Life Only	1	0	0	1
Life Annuity with 180 Payments Guaranteed	0	0	0	0
75% Continued to Named Survivor (Joint Survivor)	2	0	0	2
100% Continued to Named Survivor (Joint Survivor)	0	0	0	0
75% Continued to Annuitant or Named Survivor (Joint Survivor) Upon Death of Either	0	0	1	1
TOTAL	1	0	0	1
	5	0	1	6

TEACHERS BOARD DISABILITY ANNUITIES STARTED BY GENDER					
§. 40.63 Disability Benefits by Gender	% Pop.*	Jan	Feb	Mar	% of Total
Females	68%	4	0	1	83%
Males	32%	1	0	0	17%
TOTAL	100%	5	0	1	100%

*Active and inactive Teacher's Retirement Board population as of 12/31/07 for 2008

TEACHERS BOARD DISABILITY STATISTICS FOR APPLICATIONS SUBMITTED

TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY DETERMINATION				
Type of Determination	Jan	Feb	Mar	Total
Approved	5	2	5	12
Cancelled	0	0	0	0
Deemed Approved	0	0	0	0
Denial	0	0	0	0
Denial Rescinded: Approved	0	0	0	0
Termed	0	0	0	0
Termed Rescinded: Approved	0	0	0	0
Void/Withdrawn/Invalid	0	0	0	0
§. 40.63 Waiver	0	0	0	0
TOTAL	5	2	5	12

TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE				
§. 40.63 Disability Benefits by Age	Jan	Feb	Mar	Total
20-25	0	0	0	0
26-30	0	0	0	0
31-35	0	0	0	0
36-40	0	0	0	0
41-45	1	1	0	2
46-50	1	0	1	2
51-55	2	0	1	3
56-60	1	0	2	3
61-65	0	1	1	2
TOTAL	5	2	5	12

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS**

**WISCONSIN RETIREMENT SYSTEM (WRS)
DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
JANUARY - MARCH 2008**

TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY DISABILITY TYPE				
Disability Type	Jan	Feb	Mar	Total
Brain Injury	0	0	0	0
Cancer	1	1	3	5
Cardiovascular	0	0	0	0
Chronic Fatigue	0	0	0	0
Diabetes	0	0	0	0
Eye Disorders	0	0	0	0
Gastro/Intestinal	0	0	0	0
Mental Illness	1	0	1	2
Multiple Medical Problems	0	0	1	1
Multiple Sclerosis	0	0	0	0
Muscle/Tissue	0	0	0	0
Nephrology	0	0	0	0
Neurology	3	1	0	4
Orthopedic	0	0	0	0
Other	0	0	0	0
Reflex Sympathetic Dystrophy (RSD)	0	0	0	0
Respiratory	0	0	0	0
Unknown	0	0	0	0
TOTAL	5	2	5	12

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS**

**WISCONSIN RETIREMENT SYSTEM (WRS)
DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
JANUARY - MARCH 2008**

WI RETIREMENT BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED				
Option	Jan	Feb	Mar	Total
100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed	3	1	13	17
Life Annuity with 60 Payments Guaranteed For Annuitant's Life Only	1	2	0	3
Life Annuity with 180 Payments Guaranteed	2	1	2	5
75% Continued to Named Survivor (Joint Survivor)	4	1	1	6
100% Continued to Named Survivor (Joint Survivor)	2	0	0	2
75% Continued to Annuitant or Named Survivor (Joint Survivor) Upon Death of Either	1	2	2	5
	0	1	0	1
TOTAL	13	8	18	39

WI RETIREMENT BOARD DISABILITY ANNUITIES STARTED BY GENDER					
§. 40.63 Disability Benefits by Gender	% Pop.*	Jan	Feb	Mar	% of Total
Females	62%	8	5	9	56%
Males	38%	5	3	9	44%
TOTAL	100%	13	8	18	100%

* Active and inactive WR population as of 12/31/2007 for 2008

WI RETIREMENT BOARD DISABILITY STATISTICS FOR APPLICATIONS SUBMITTED

WI RETIREMENT BOARD DISABILITY APPLICATIONS SUBMITTED BY DETERMINATION				
Type of Determination	Jan	Feb	Mar	Total
Approved	12	8	18	38
Cancelled	0	0	1	1
Deemed Approved	0	0	0	0
Denial	0	0	1	1
Denial Rescinded: Approved	0	1	0	1
Other	0	0	0	0
Termed	0	0	0	0
Term. Rescinded: Approved	0	0	0	0
Void/Withdrawn/Invalid	0	0	1	1
§. 40.63 Waiver	0	0	0	0
TOTAL	12	9	21	42

WI RETIREMENT BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE				
§. 40.63 Disability Benefits by Age	Jan	Feb	Mar	Total
20-25	0	0	0	0
26-30	0	0	0	0
31-35	0	0	0	0
36-40	0	0	0	0
41-45	0	1	2	3
46-50	1	3	8	12
51-55	5	2	5	12
56-60	5	3	4	12
61-65	1	0	2	3
TOTAL	12	9	21	42

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS**

**WISCONSIN RETIREMENT SYSTEM (WRS)
DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
JANUARY - MARCH 2008**

WI RETIREMENT BOARD DISABILITY DETERMINATIONS				
Disability Type	Jan	Feb	Mar	Total
Brain Injury	0	0	0	0
Cancer	1	0	2	3
Cardiovascular	3	0	1	4
Chemical Dependency	0	0	0	0
Diabetes	1	0	0	1
Eye Disorders	0	2	0	2
Gastro/Intestinal	0	0	1	1
Hearing Disorders	0	0	0	0
Mental Illness	2	0	4	6
Multiple Medical Problems	0	3	0	3
Multiple Sclerosis	0	0	0	0
Muscle/Tissue	1	0	0	1
Nephrology	0	1	2	3
Neurology	0	1	4	5
Orthopedic	3	1	4	8
Other	0	1	1	2
Reflex Sympathetic Dystrophy (RSD)	0	0	0	0
Respiratory	1	0	2	3
Unknown	0	0	0	0
TOTAL	12	9	21	42



STATE OF WISCONSIN
Department of Employee Trust Funds
David A. Stella
SECRETARY

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CORRESPONDENCE MEMORANDUM

DATE: May 29, 2008
TO: Teachers Retirement Board
Wisconsin Retirement Board
FROM: Diane Poole, Director
Disability Programs Bureau
SUBJECT: January 2008 – March 2008 Quarterly Disability Annuity Statistics

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

Attached is the Wisconsin Retirement System (WRS) *Disability Benefit Annuity Statistical Report* for January through March 2008. The report provides quarterly data on: number of annuities started, options selected, gender, determination, age, and disability type.

TRENDS

Overall, there was little change in trends this quarter when compared to the same quarter in the past five years:

- The number of new disability annuities is down slightly. The Teachers Retirement Board (TR) had 6, compared to an average of 14; the Wisconsin Retirement Board (WR) had 39, compared to an average of 46. The Wisconsin Retirement Board (WR) average for the past three years is 39. 2004 first quarter tends to skew the WR Board data as it was an unusually high year with 63.
- The most selected annuity option for TR is "Life with 180 Payments Guaranteed." The most selected annuity option for WR remains "100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed."
- Females continue to be the predominant user of the \$40.63 Disability Retirement Annuity benefit for both the TR Board and WR Board.
- The majority of applications are approved; a very small number are denied.
- The predominant age groups for TR are 51-55 and 56-60. Predominate age groups for WR are 46-50, 51-55, and 56-60.
- The prevalent disability types for the TR Board for this quarter in the last five years are: Cancer, Mental Illness and Orthopedic. For the WR Board, the prevalent disability types are: Orthopedic, Neurology, and Cancer.

Reviewed and approved by Tom Korpady, Division of Insurance Services.

Signature _____

Date _____

Board	Mtg Date	Item #
TR	6/26/08	3
WR	6/26/08	4

DISABILITY PROGRAMS BUREAU WORKLOAD

Staffing

The Disability Programs Bureau is staffed by 5.5 trust funds specialists and 2.5 policy analysts. One policy analyst was a new hire in March 2007. Two trust funds specialists began last year in July and September. We also received a new trust funds specialist leadworker position and filled that position in January 2008. The trust fund specialists are responsible for the §40.63 and §40.65 programs. One of the experienced trust funds specialists is part-time. Currently, 55% of our trust funds specialists and 40% of our policy analysts are in training. It takes approximately 1.5 to 2 years to fully train a trust funds specialist in our complex disability programs and approximately 2.5 years for a policy analyst to complete training.

Backlog

The statutorily required review of tax returns for the §40.65 program had a backlog of about three years. By adding the leadworker position and shifting some staff responsibilities, more experienced staff are dedicating a few hours per week to review tax returns. We have made substantial progress in alleviating this backlog.

PRIORITIES

The top priority for the Disability Programs Bureau is to approve disability benefits as quickly as possible so individuals are not without income. Approving a disability benefit requires extensive follow-up with the applicant, employer, and health care providers. An application can take up to a year to process because of this inherent dependency on outside sources to provide documentation. The second priority is to maintain existing disability accounts. This requires obtaining updated medical and income information, which again requires extensive follow-up with outside sources.