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Correspondence Memorandum

Date: May 22, 2020

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

From: Anne Boudreau, Deputy Administrator
 Division of Retirement Services

Subject: Retirement and Customer Service Update

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 feedback, and process improvement projects.


Workload Demand

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

The number of retirement estimate requests and retirement applications received both increased significantly in the first quarter of 2020, as compared to the same quarter in 2019. These will be numbers to watch for the second quarter.

	2019	2020	Change
Q1			
Retirement Estimates Requested	6,889	8,568	+ 24.4%
Retirement Applications Received	3,005	4,129	+ 37.4%
Retirement Annuities Started	2,354	2,561	+ 8.8%

Comparing the first quarter of 2020 to the first quarter of 2019, the average turnaround time for a retirement estimate decreased from 13 days to 11 days, and in March the turnaround time significantly decreased. As mentioned in last quarter's report, this improved turnaround time is due to improvements to the retirement estimate process, the staffing model, and the staff training process.

Reviewed and approved by Matt Stohr, Administrator, Div. of Retirement Services
 Electronically Signed 6/2/20

Board	Mtg Date	Item #
ETF	6.18.20	6D
TR	6.18.20	4D
WR	6.18.20	4D

- **Call Center**

	2019	2020	Change
Q1			
Calls	48,655	53,816	+ 10.6%
Email	4,102	5,651	+ 37.8%
Total	52,757	59,467	+ 12.7%

The average speed of answer in the first quarter of 2020 was 3 minute and 5 seconds, compared to 3 minutes and 41 seconds in the first quarter of 2019. This improved speed of answer happened even though the volume of calls increased quite a lot. The call center was able to post this better speed of answer due in part to the callback feature in our new call routing system (less wait time for members) and in part due to better staffing.

Customer Feedback—Compliments for Staff

Here are a few of the compliments staff received during the first quarter of 2020:

A WRS agent called to get help reporting employee data. She was dealing with a new payroll system at her office and was feeling quite stressed and frustrated. She received help from ETF's Employer Services Section and said of the staff person,

"She has been such a help to me over the past year. She never got upset with me. She was always helpful and kind. With her help, I was able to get everything reported in a timely manner. I just wanted you to know this because good employees and exceptional customer service is hard to find these days."

Retiree John S. spoke with a Trust Funds specialist in the call center. He wanted to change his tax withholding and beneficiary designation and was feeling quite frustrated with technology. The Trust Funds Specialist turned him into a satisfied customer. He spoke with her supervisor and said,

"She said she would send me the paper forms. She said when I received those, I could call back and she would help me complete the forms. ...She was so polite, so helpful, and the best person I've talked to at the state in years! Thank you for having a nice employee."

Member Mason G. called a supervisor to compliment the Trust Funds Specialist who had helped him understand his retirement options. He said of the ETF staff person,

"I had 100 questions, and he helped me go through my retirement paperwork. He was polite, informative, and eager to help. He is definitely an asset to the state of Wisconsin. You have a winner in this man! He is just fantastic!"

Process Improvement Projects

Here are a few brief updates on projects going on in the Division of Retirement Services.

Appointment Scheduling Software

As you know, ETF has been working to implement appointment-scheduling software, which will allow for more automated and flexible scheduling of appointments, and eventually members will be able to select their own appointments online.

Training for staff had been planned in the form of multiple in-person classroom sessions. This training had to be converted to remote, individual training using the “GoTo Training” technology since staff began working from home. This was successful—and was quite a feat given the last-minute need to change and the fact that the training had to provide hands-on training for the staff users.

Phase 1 of the “Q-flow” system went live on April 6. The software is making it easier to book member appointments and to assign ETF staff to handle these appointments. Members receive a confirmation at the time of booking and also shortly before the day of their appointment. We are in the process of measuring the time savings for staff, which is significant.

CARES 2

Phase 2 of the Centurion CARES call routing system was successfully implemented on May 20. Upgrades include:

- Comfort messages that provide important information to members while they wait in queue.
- Transfer of member pre-authentication information and account screen when a call is transferred to an ETF expert.
- A system check to verify callback numbers are valid telephone numbers (to prevent user error when keying numbers).
- Addition of a survey on the WRS *employer* line.
- Integration of CARES with ETF’s password management tool to sync passwords so that call center agents have a “single sign-on.”

Missing Members – Special Project

There are approximately 175,000 WRS members who are no longer working in a WRS-covered position and who have not yet taken a benefit from their WRS account. Many of these “inactive” members did not keep ETF informed when their addresses change.

In accordance with Chapter 40 of the Wisconsin Statutes, ETF begins looking for these “lost” members in the year of the member’s 65th birthday. As you may imagine, the trail can be cold by then. This is especially true for female members who may change their

surnames when they marry or divorce. We have tried to begin searching for members sooner, but due to workload and staffing constraints, this has not always been possible.

This task is in the Member Services Bureau. When staff began working from home in the middle of March, workbaskets were in good shape. This was due to recent retirement process improvements, a new staffing model, a lack of vacancies, a large percentage of fully trained staff, and less outreach travel. Therefore, the bureau determined to focus some effort on searching for all members with a lost contact date on their file, as soon as possible, regardless of their age or the number of years they have been “lost.”

A query of our systems returned a massive list of nearly 30,000 “lost” members. A staff person and a supervisor created a procedure, trained 11 additional team members, and began trying to locate these members. In the first month, the team was able to reduce the number of “missing” members by nearly 800. This is a significant beginning. Though these 800 are only about 2.5% of the total number, the impact on the individual members has been enormous. It is common that these “lost” members do not realize they have a WRS account, or thought they lost any retirement contributions when they terminated employment. For some members, the money could not have come at a better time!

Here are just a few examples:

- One member was in a rehab center recovering from a brain infection. He is expected to recover yet has a long road ahead. He thought this was a sign that things will be okay.
- One woman received a layoff notice yesterday. She is not in Wisconsin anymore and had forgotten about those years in the late 1970s. Learning she had more than \$48,000 in her account brought her to tears. The staff person said, “She actually screamed!”
- Another member is a teacher in NY and is currently recovering from the COVID-19 virus. She said this money will really help.
- A woman who worked under the WRS in the 1980s has \$1,300 in her account, but you would have thought she won the lottery! She said that she and her husband are both still working but their hours have been reduced and they are getting behind with bills. She said this could not have come at a better time.
- Another woman did not remember working for two years for a municipal employer in the 1980s. Her account has \$39,000. She was just laid off from her job. Her husband picked up a second job to help make ends meet. Staff reported, “She was so thrilled with this news that she wanted me to have a virtual old fashioned with her, which she was making while we were on the phone! I told her I can’t drink during work! She couldn’t wait for her husband to come home!”

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