



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
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**CORRESPONDENCE MEMORANDUM**

**DATE:** June 7, 2007  
**TO:** Employee Trust Funds Board  
**FROM:** Jean Gilding, Deputy Administrator  
 Audrey Koehn, Policy Advisor  
 Division of Retirement Services  
**SUBJECT:** Backlog and Wait-Time Statistics

**BACKLOGS AND WAIT-TIMES**

The following table provides backlog and processing wait-times, as of May 31, 2007, for some of the Department's critical, direct service functions. Since the report issued in March 2007, the Department has added six additional service functions to this report.

Name of Function	Number of Transactions in Backlog Status	Wait-Time
Retirement Estimate Requests	1254	8 Weeks
Individual Retirement Appointments	N/A	5 Weeks
Retirement Applications	739	4 Weeks
Estimate-to-Final Retirements	3500	7 Months
Beneficiary Designations	245	2 Weeks
Military Service Affidavits	214	4 Weeks
Annuitant Death Benefit Estimates	382	4 Weeks
Non-Annuitant Death Benefit Estimates	92	3 Weeks
Pension Verifications	24	1 Week
Service Purchase Estimates (not Other Governmental Service)	222	5 Weeks
General Correspondence	226	10 Weeks
Group Appointments	N/A	2 Days
Annuitant Health Insurance Requests	41	4 Weeks
Qualified Domestic Relations Order Splits	55	4 Weeks
Separation Applications	760	16 Weeks
Disability Estimates	40	1 Week
Disability Applications	88	Current *
Duty Disability Tax Return Reviews	175**	Up to 3 Years

\* These applications are on hold pending receipt of materials from external sources.

\*\*Department receives approximately 900 per year.

Reviewed and approved by Sari King, Administrator, Division of Retirement Services.

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 Signature Date

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### Backlog Changes

Changes in backlog occur for several reasons, including increased demand for service, annual processing demand, and seasonal workload peaks (i.e., teacher retirements in June, non-teacher retirements at year-end, separation benefit requests resulting from the distribution of annual WRS Statements of Benefits). In response to these trends, the Department shifts staff resources and re-prioritizes workforce efforts.

Since the last report to the Board in March, some of the more significant changes in backlogs occurred in the finalization of estimated annuities and the processing of beneficiary designations. The number of estimated annuities waiting for finalization dropped from 4,817 to 3,500, a decrease of 27 percent. The number of beneficiary designations awaiting processing dropped from 2,244 to 245, a decrease of 89 percent. Beneficiary designation processing fluctuates significantly on a seasonal basis due to the resource shifting that occurs in order to perform the annual WRS employer reconciliation process between January and March of each year. The most significant backlog increases occurred in the processing of retirement estimates, retirement applications, and separation applications.