

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS
WRS DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
2003: December 2004: January-February**

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 Audrey Koehn at (608) 261-8173 or Audrey.Koehn@etf.state.wi.us, Peg Narloch at (608) 267-9035 or Peg.Narloch@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Denial Rescinded: Approved – This determination is used for disability applications in situations where the application was initially denied because the applicant does not meet the statutory requirements and 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Termed Rescinded: Approved - This determination is used for disability applications in situation where the application was initially approved and an annual medical recertification was completed indicating that the disable recipient was no longer disabled or did not comply with the medical or financial requests. The termination may be rescinded upon receipt of certifying medical report from the physician, financial information from the recipient or based on an appeal determination.

Withdrawn/Void – This determination is used when 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 - This determination is used when a 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				
	Dec-03	Jan-04	Feb-04	Total
Disability Estimates Requested	61	62	80	203
Disability Estimates Completed	62	59	73	194
Disability Annuities Started (on payroll)				
	Dec-03	Jan-04	Feb-04	Total
Teachers Retirement Board s. 40.63	6	4	4	14
Wisconsin Retirement Board s. 40.63	14	21	15	50
s. 40.65 Duty Disability (WR Board)	3	1	3	7
Total Annuities Started	23	26	22	71

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TEACHERS BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED				
Option	Dec-03	Jan-04	Feb-04	Total
12 100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed	1	2	2	5
17 Life Annuity with 60 Payments Guaranteed	1	1	0	2
24 For Annuitant's Life Only	0	0	0	0
25 Life Annuity with 180 Payments Guaranteed	2	1	1	4
26 75% Continued to Named Survivor (Joint Survivor)	1	0	0	1
27 100% Continued to Named Survivor (Joint Survivor)	1	0	1	2
28 75% Continued to Annuitant or Named Survivor (Joint Survivor) Upon Death of Either	0	0	0	0
TOTAL	6	4	4	14

TEACHERS BOARD DISABILITY ANNUITIES STARTED BY GENDER				
s. 40.63 Disability Benefits by Gender	Dec-03	Jan-04	Feb-04	Total
Females	5	2	2	9
Males	1	2	2	5
TOTAL	6	4	4	14

TEACHERS BOARD DISABILITY STATISTICS FOR APPLICATIONS SUBMITTED

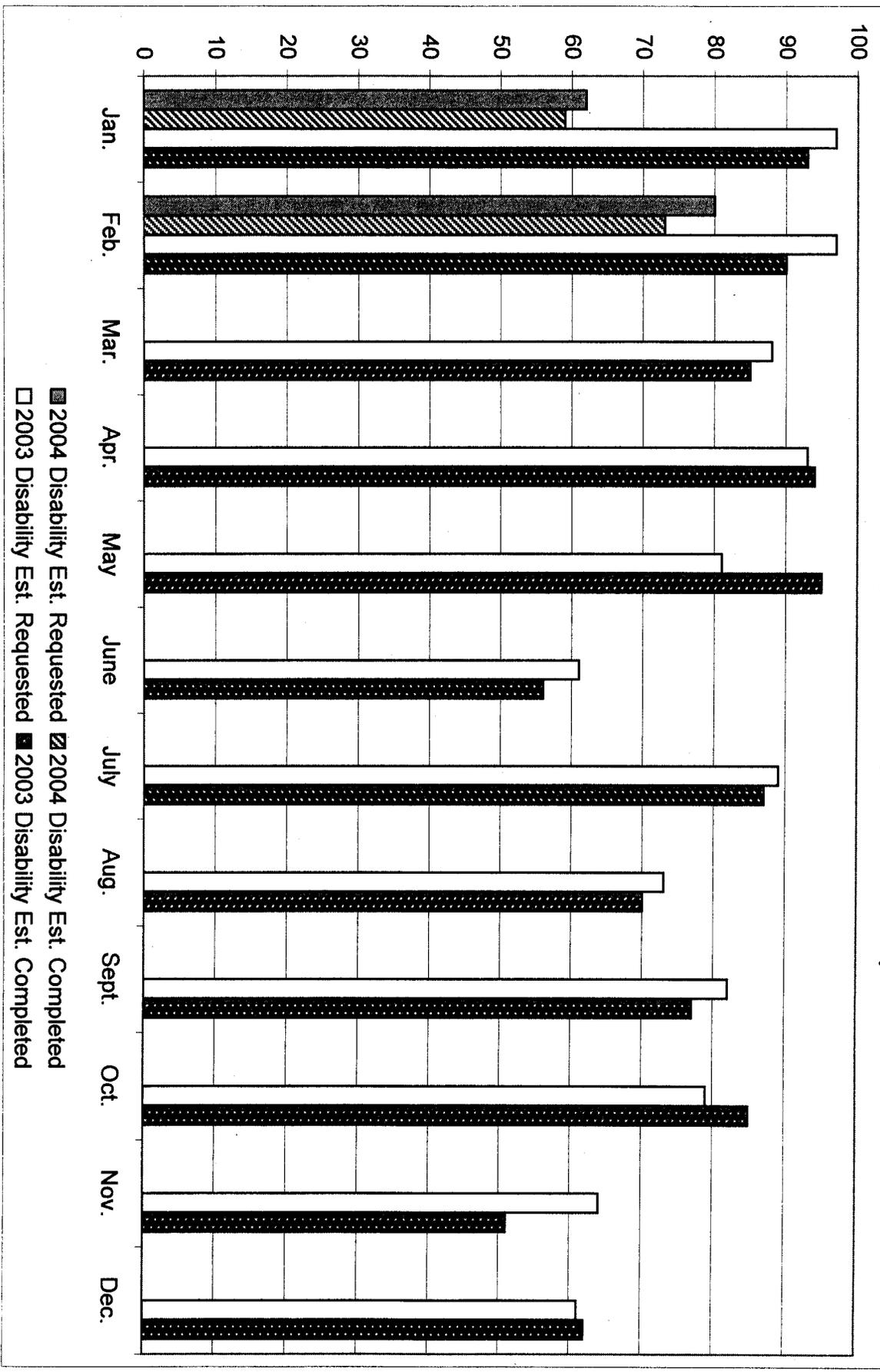
TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY DETERMINATION				
Type of Determination	Dec-03	Jan-04	Feb-04	Total
Approval	8	4	4	16
Cancelled	0	0	0	0
Deemed Approved	1	1	0	2
Denial	0	0	0	0
Denial Rescinded: Approved	0	0	2	2
Termed	0	0	0	0
Termed Rescinded: Approved	0	0	0	0
Void	0	0	1	1
s. 40.63 Waiver	0	1	0	1

TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE				
s. 40.63 Disability Benefits by Age	Dec-03	Jan-04	Feb-04	Total
31-35	0	0	0	0
36-40	0	0	1	1
41-45	1	1	0	2
46-50	1	1	0	2
51-55	4	2	4	10
56-60	3	2	2	7
61-65	0	0	0	0
TOTAL	9	6	7	22

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TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY DISABILITY TYPE				
Disability Type	Dec-03	Jan-04	Feb-04	Total
Brain Injury	0	0	0	0
Cancer	2	3	0	5
Cardiovascular	0	0	3	3
Chronic Fatigue	0	0	0	0
Eye Disorders	0	0	0	0
Gastro/Intestinal	1	0	0	1
Mental Illness	2	1	1	4
Multiple Medical Problems	2	1	1	4
Multiple Sclerosis	0	0	0	0
Muscle/Tissue	0	0	0	0
Nephrology	1	0	0	1
Neurology	1	0	1	2
Orthopedic	0	0	0	0
Other	0	0	1	1
RSD-Reflex Symptathetic Dystorphy	0	0	0	0
Respiratory	0	0	0	0
Unknown	0	1	0	1
TOTAL	9	6	7	22

2004 v. 2003 Disability Estimates Requested and Completed



**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS
WRS RETIREMENT BENEFIT ANNUITY STATISTICAL REPORT
December 2003 and January-February 2004**

This report provides summary information on recent retirement benefit annuity applications approved and terminated by the Boards. If you have any questions, or would like additional information regarding retirement benefits, please contact Shelly Schueller at (608) 266-6611 or shelly.schueller@etf.state.wi.us

WRS RETIREMENT ANNUITIES

RETIREMENT BENEFIT APPLICATIONS

	Dec-03	Jan-04	Feb-04	Total
Retirement Estimates Requested	844	1,573	1,507	3,924
Retirement Estimates Completed	905	1,774	1,823	4,502
Retirement Annuities Started				
As Estimated Annuities	127	657	470	1,254
As Final Annuities	430	174	182	786
Total Annuities Started	557	831	652	2,040
Retirement Annuities Started by Option Selected*				
01 For Annuitant's Life Only	51	24	24	99
02 Life Annuity with 60 Payments Guaranteed	45	14	20	79
04 Life Annuity with 180 Payments Guaranteed	89	46	47	182
07 75% Continued to Named Survivor (Jt. Survivor)	41	24	22	87
09 Reduced 25% on Death of Annuitant or Named Surv. (Jt.S.)	23	11	13	47
11 100% Continued to Named Survivor (Jt. Survivor)	45	15	22	82
12 100% Cont'd to Named Surv.(Jt. S.)w/180 Paym'tsGuarant.	131	35	31	197
21 Annuity Certain (Specified 24-180 Months)	1	0	0	1
29 Annuity Certain -- 24 Months**	0	0	1	1
30 Annuity Certain -- 60 Months**	1	2	1	4
31 Annuity Certain -- 120 Months**	1	3	1	5
40 Life with 180 Payments Guaranteed (Mandatory)	0	0	0	0
41 Life with Optional Length Guaranteed (Mandatory)	0	0	0	0
42 Life with Optional Length Guaranteed	1	0	0	1
50 Retirement Lump Sum	102	22	165	289
Calculation Type that Yielded Higher Annuity				
Formula	187	72	76	335
Money Purchase	243	102	102	447
Number at Maximum Formula Benefit				
	0	1	1	2

*Note: Because participants with additional contributions may select different additional annuity options for their regular and additional retirement benefits, the total by option selected will not match the total number of retirement annuities started on a month-to-month basis.

** = Annuities Based on Additional Contributions

RETIREMENT ANNUITIES FINALIZED BY FUND TYPE

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	Dec-03	Jan-04	Feb-04	Total
Fixed Fund	331	141	152	624
Variable Fund	105	39	36	180

RETIREMENT ANNUITIES FINALIZED BY EMPLOYER TYPE				
	Dec-03	Jan-04	Feb-04	Total
Local Employers	300	128	128	556
State Government	131	46	55	232

RETIREMENT ANNUITIES FINALIZED BY GENDER				
	Dec-03	Jan-04	Feb-04	Total
Females	242	97	102	441
Males	188	77	80	345

RETIREMENT BENEFIT ANNUITY TERMINATIONS				
<u>Termination Type</u>	Dec-03	Jan-04	Feb-04	Total
Returned to Work	5	1	4	10
Medical (s. 40.63)	0	0	0	0
Disability cancellation rescinded	0	0	0	0
Not Eligible/Put on in Error	0	0	2	2
Put on Reg. Add'l in Error	0	0	9	9
Total Benefit Terminations	5	1	15	21

GROSS ANNUITY PAYMENTS IN DOLLARS (\$)					
	Fixed	Variable	Subtotal	General (GPR)	Total
Dec-03	199,735,358.28	22,796,437.41	222,531,795.69	249,351.86	222,781,147.55
2003 Total	2,344,443,175.48	305,935,650.12	2,650,378,825.60	3,230,762.49	2,653,609,588.09
January-04	199,592,710.46	22,784,630.96	222,377,341.42	245,775.92	222,623,117.34
February-04	200,168,866.58	22,821,450.68	222,990,317.26	236,862.02	223,227,179.28

WRS BENEFICIARY ANNUITIES				
	Dec-03	Jan-04	Feb-04	Total
Beneficiary Annuities Started	5	6	2	13
Beneficiary Annuities Terminated				
Converted Contin. to Lump Sum	0	1	0	1
File set up in error (spouse living)	0	1	1	2
TOTAL	0	2	1	3