

Wisconsin Department of Employee Trust Funds
RFP ETH0052-54 Addendum Number 1
Customer Service Inquiry Report

OVERVIEW OF DOCUMENT

This document provides a comprehensive report on Customer Service Inquiry (CSI) from Quarter 3 of 2017 through Quarter 2 of 2018 and with dates ranging from July 1, 2017 through June 30, 2018. The quarterly reports and annual summary were combined to provide a holistic view of reports and analysis expected to be provided by the Contractor to the Department. It is expected that the Contractor will provide the Department reports on customer service inquiries with trend statistics and data analysis on a monthly, quarterly, and fiscal year-end basis for review.

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Data Report on Customer Service Inquiry (CSI)

July 1, 2017 through September 30, 2017

Quarter 3



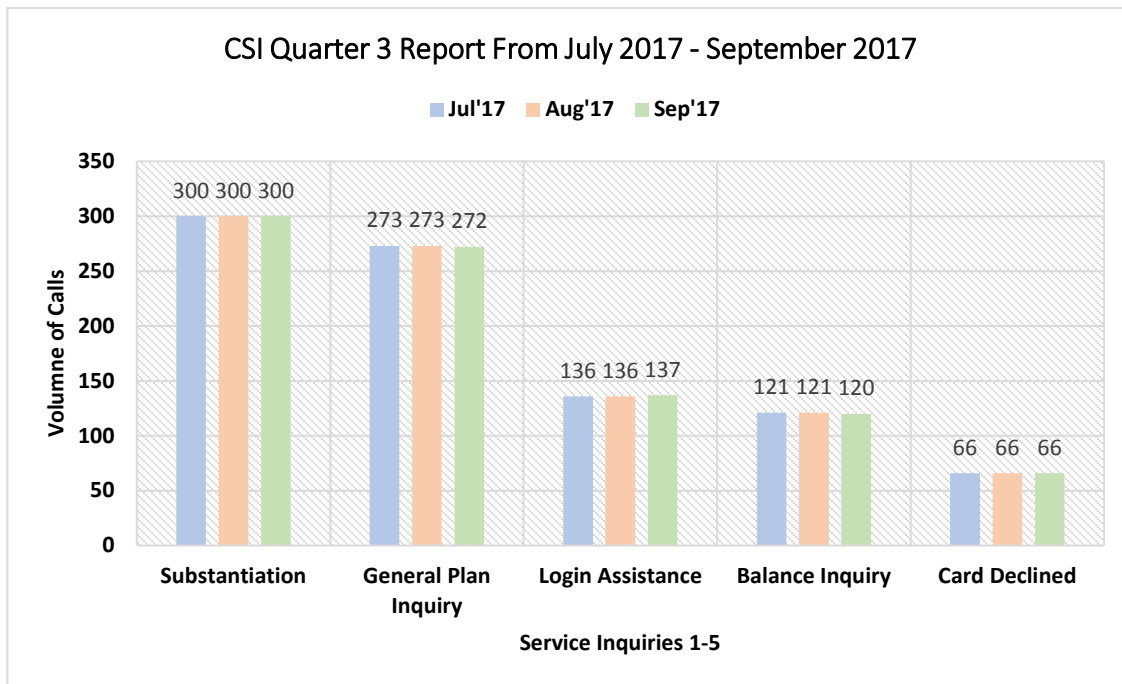
2017 Customer Service Inquiry (CSI) Report - Quarter 3

Date Period: 07/01/2017 - 09/30/2017

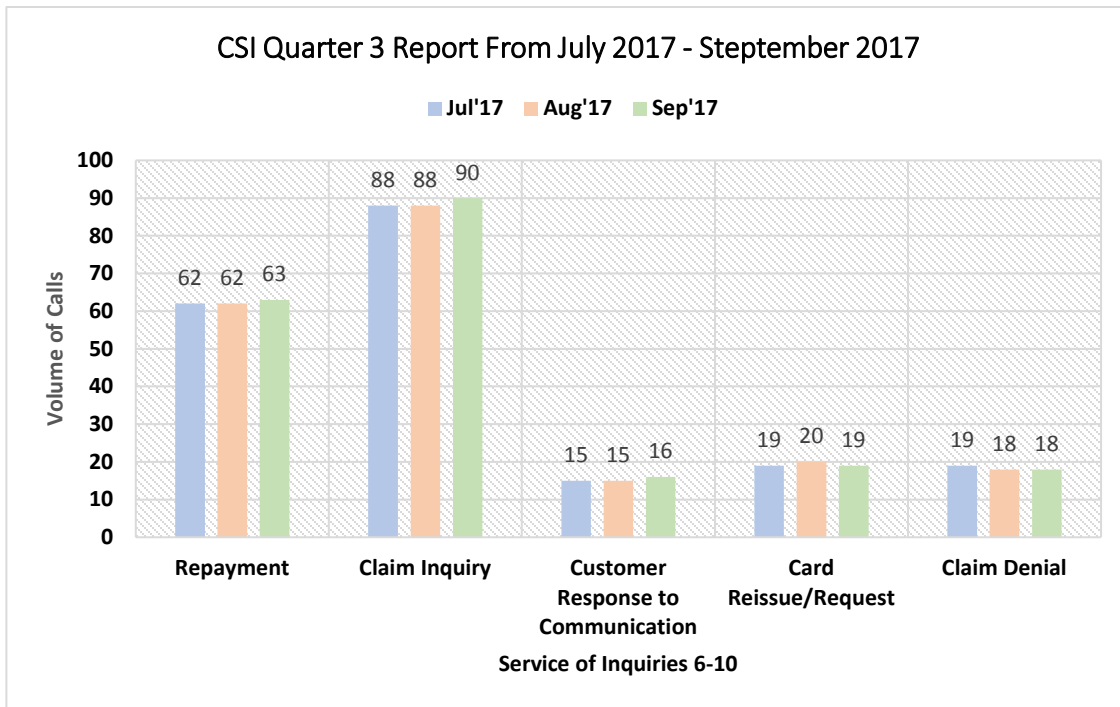
Table 1.1 (1-15 Service Inquiries)

CSI Quarter 3 Report From July 2017 - September 2017				
Service Inquiries	Jul'17	Aug'17	Sep'17	Total Volume of Calls
Substantiation	300	300	300	900
General Plan Inquiry	273	273	272	818
Login Assistance	136	136	137	409
Balance Inquiry	121	121	120	362
Card Declined	66	66	66	198
Repayment	62	62	63	187
Claim Inquiry	88	88	90	266
Customer Response to Communication	15	15	16	46
Card Reissue/Request	19	20	19	58
Claim Denial	19	18	18	55
Dead Air	19	19	20	58
Wrong Number	6	6	6	18
Carryover Balances	1	0	0	1
Enrollment	5	6	6	17
Other	92	92	94	278

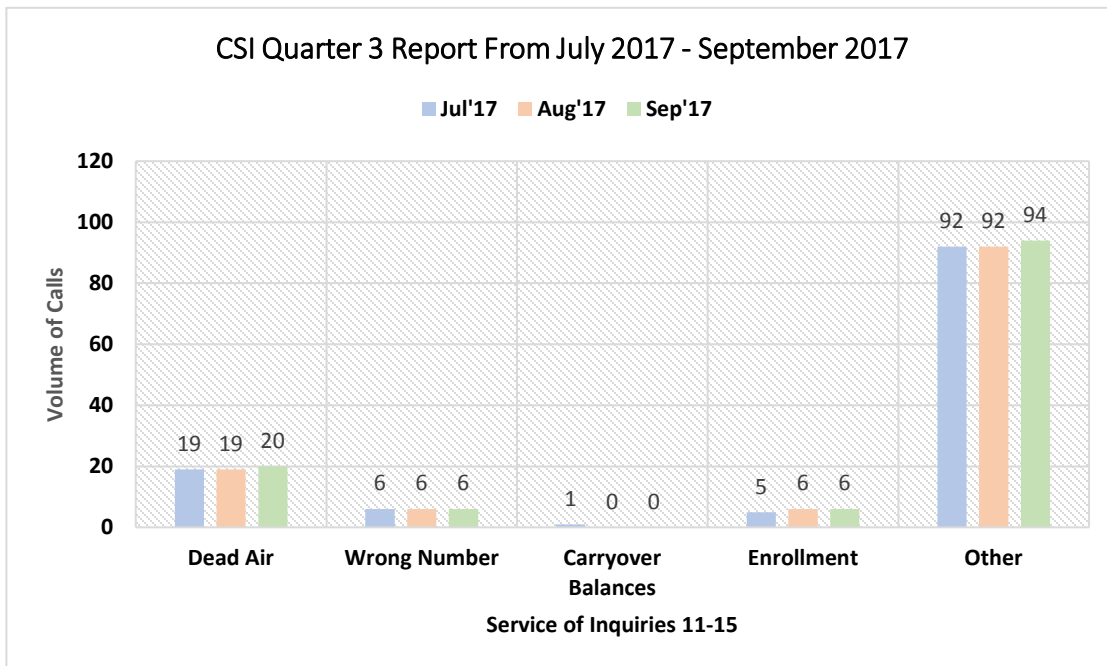
Graph 1 (Table 1.1, Service Inquiries 1-5)



Graph 2 (Table 1.1, Service Inquiries 6-10)



Graph 3 (Table 1.1, Service Inquiries 10-15)

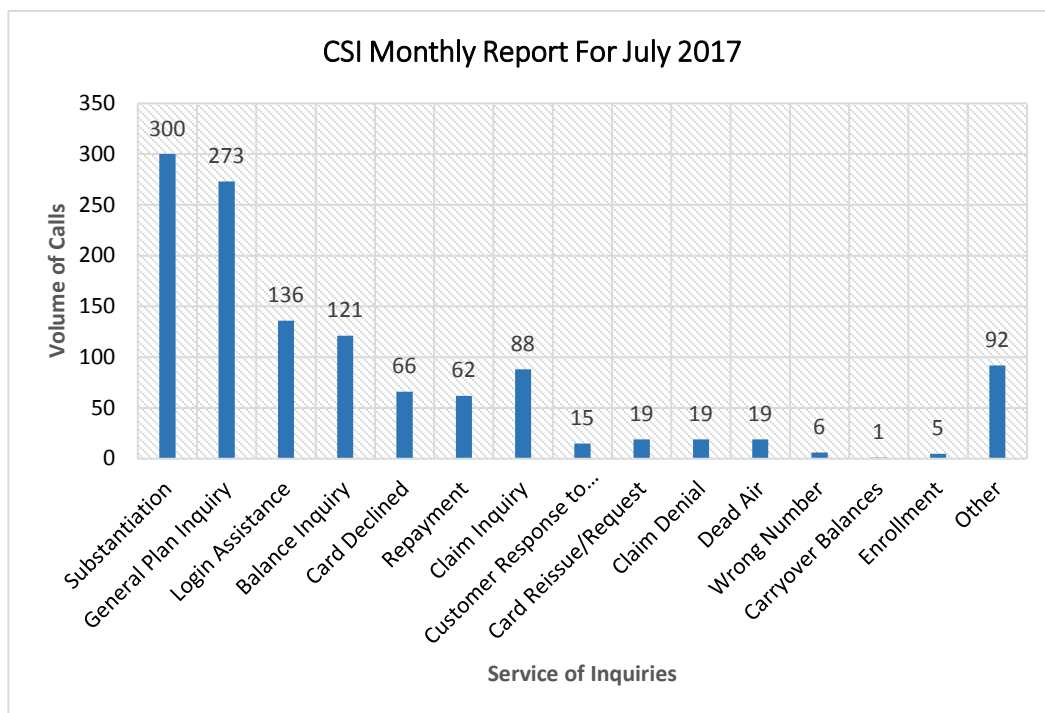


Customer Service Inquiry (CSI) Report For July 2017
Date Period: 07/01/2017 - 07/31/2017

Table 2.1

CSI Monthly Report For July 2017	
Service Inquiries	Volume of Calls
Substantiation	300
General Plan Inquiry	273
Login Assistance	136
Balance Inquiry	121
Card Declined	66
Repayment	62
Claim Inquiry	88
Customer Response to Communication	15
Card Reissue/Request	19
Claim Denial	19
Dead Air	19
Wrong Number	6
Carryover Balances	1
Enrollment	5
Other	92

Graph 4 (Table 2.1)



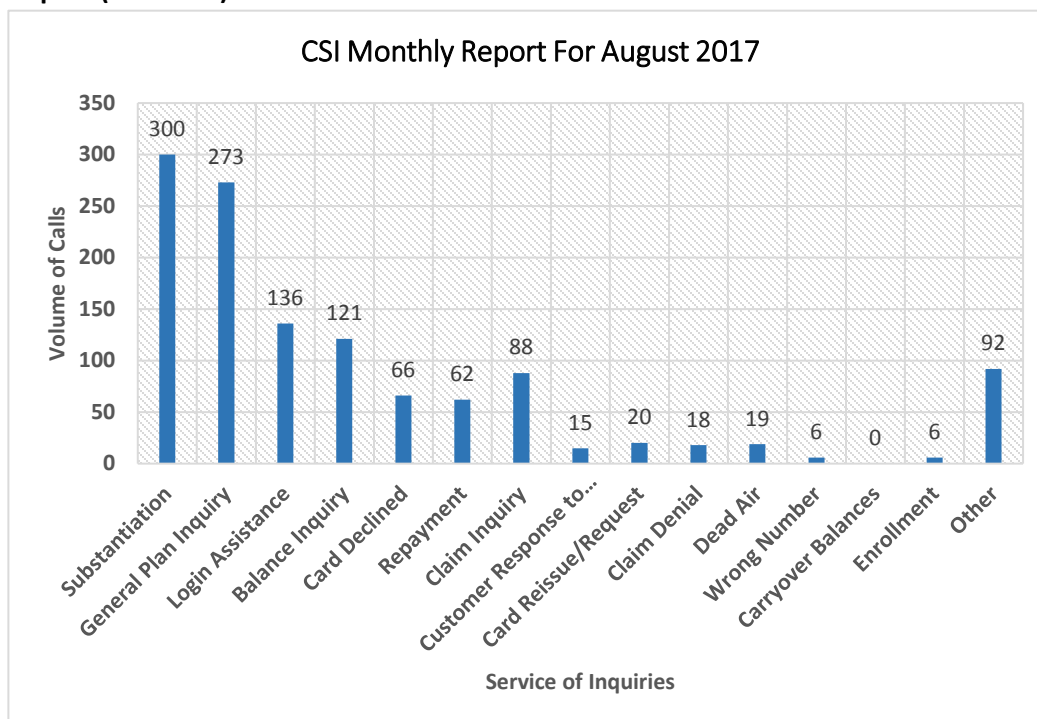
Customer Service Inquiry (CSI) Report For August 2017

Date Period: 08/01/2017 - 08/31/2017

Table 3.1

CSI Monthly Report For August 2017	
Service Inquiries	Volume of Calls
Substantiation	300
General Plan Inquiry	273
Login Assistance	136
Balance Inquiry	121
Card Declined	66
Repayment	62
Claim Inquiry	88
Customer Response to Communication	15
Card Reissue/Request	20
Claim Denial	18
Dead Air	19
Wrong Number	6
Carryover Balances	0
Enrollment	6
Other	92

Graph 5 (Table 3.1)



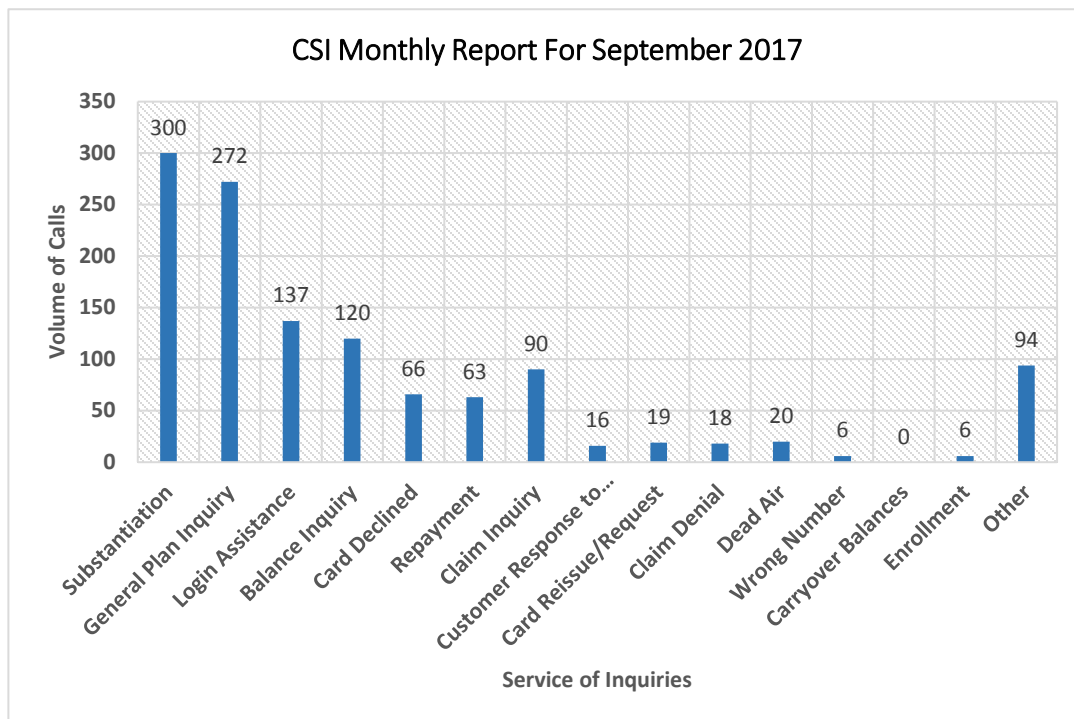
Customer Service Inquiry (CSI) Report For September 2017

Date Period: 09/01/2017 - 09/30/2017

Table 4.1

CSI Report Monthly For September 2017	
Service Inquiries	Volume of Calls
Substantiation	300
General Plan Inquiry	272
Login Assistance	137
Balance Inquiry	120
Card Declined	66
Repayment	63
Claim Inquiry	90
Customer Response to Communication	16
Card Reissue/Request	19
Claim Denial	18
Dead Air	20
Wrong Number	6
Carryover Balances	0
Enrollment	6
Other	94

Graph 6 (Table 4.1)



Data Report on Customer Service Inquiry (CSI)
October 1, 2017 through December 31, 2017
Quarter 4



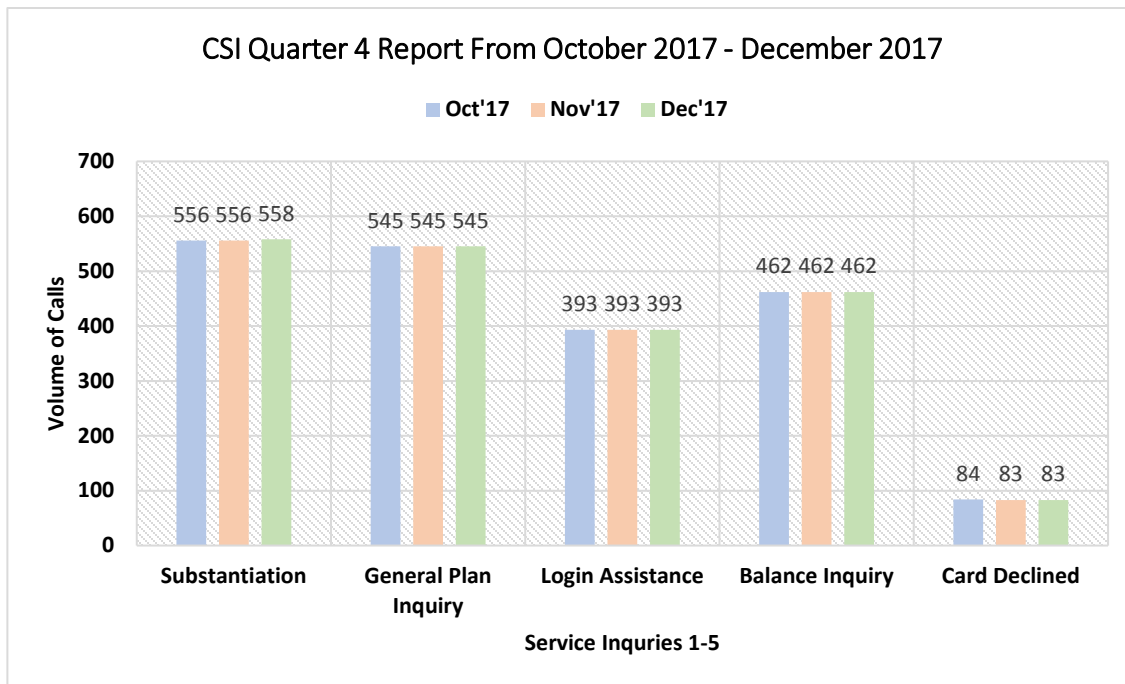
2017 Customer Service Inquiry (CSI) Report - Quarter 4

Date Period: 10/01/2017 - 12/31/2017

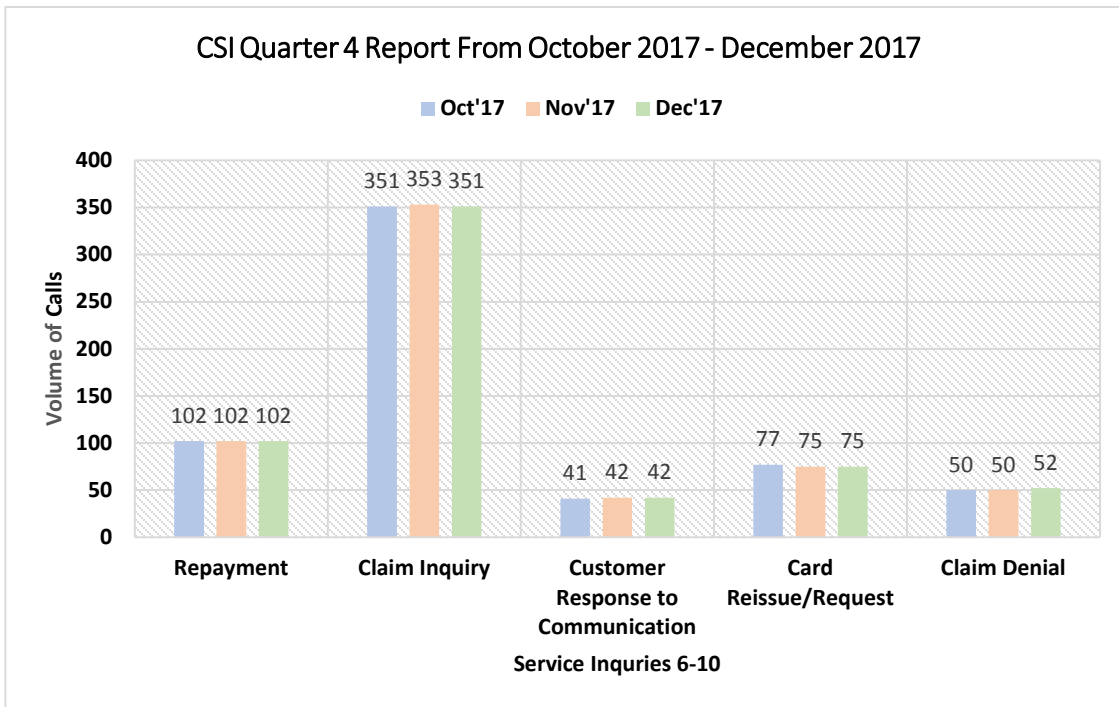
Table 1.1 (1-17 Service Inquiries)

CSI Quarter 4 Report From October 2017 - December 2017				
Service Inquiries	Oct'17	Nov'17	Dec'17	Total Volume of Calls
Substantiation	556	556	558	1670
General Plan Inquiry	545	545	545	1635
Login Assistance	393	393	393	1179
Balance Inquiry	462	462	462	1386
Card Declined	84	83	83	250
Repayment	102	102	102	306
Claim Inquiry	351	353	351	1055
Customer Response to Communication	41	42	42	125
Card Reissue/Request	77	75	75	227
Claim Denial	50	50	52	152
Dead Air	59	59	61	179
Wrong Number	18	19	18	55
Carryover Balances	7	7	6	20
Enrollment	308	308	308	924
Other	136	138	136	410

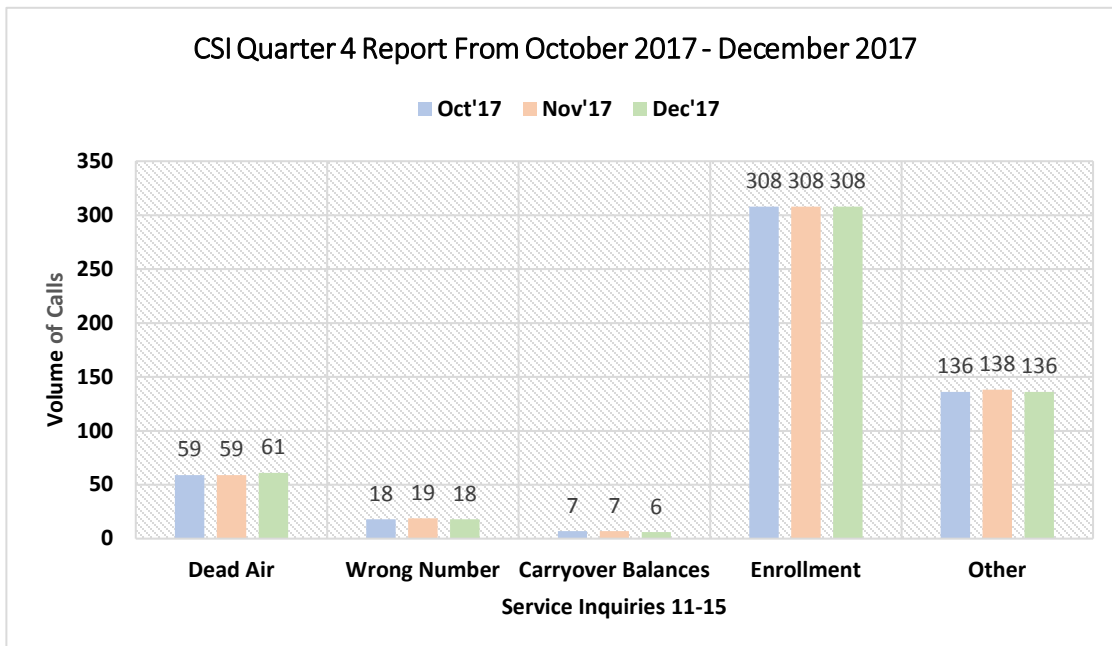
Graph 1 (Table 1.1, 1-5 Service Inquiries)



Graph 2 (Table 1.1, 6-10 Service Inquiries)



Graph 3 (Table 1.1, 11-15 Service Inquiries)



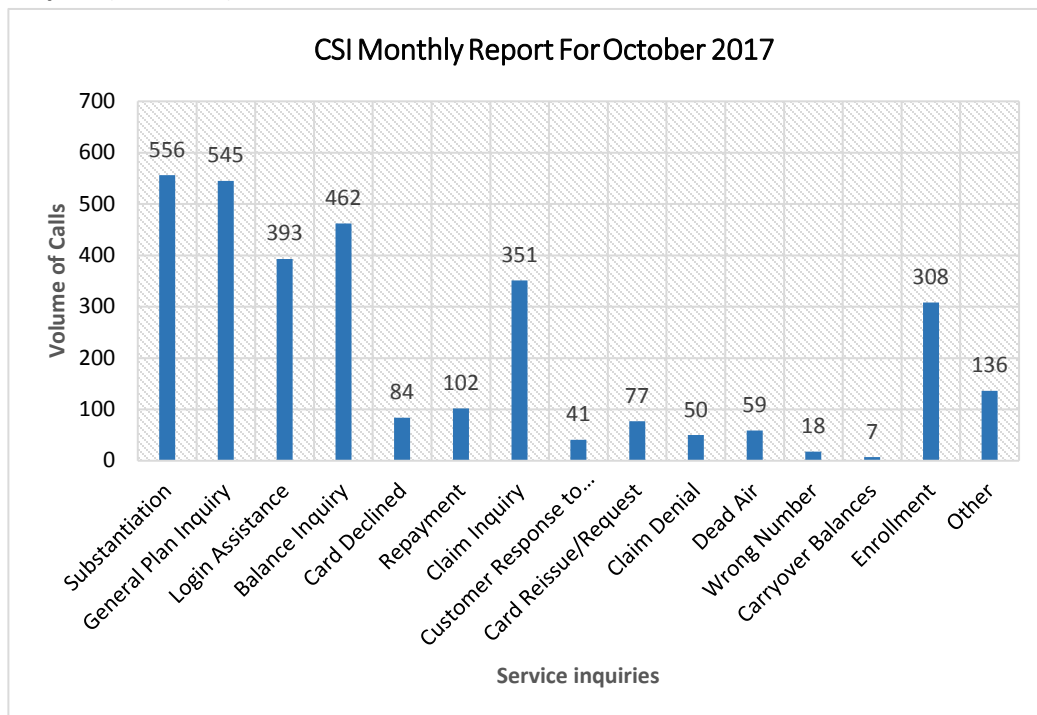
Customer Service Inquiry (CSI) Report For October 2017

Date Period: 10/01/2017 - 10/31/2017

Table 2.1

CSI Monthly Report For October 2017	
Service Inquiries	Volume of Calls
Substantiation	556
General Plan Inquiry	545
Login Assistance	393
Balance Inquiry	462
Card Declined	84
Repayment	102
Claim Inquiry	351
Customer Response to Communication	41
Card Reissue/Request	77
Claim Denial	50
Dead Air	59
Wrong Number	18
Carryover Balances	7
Enrollment	308
Other	136

Graph 4 (Table 2.1)



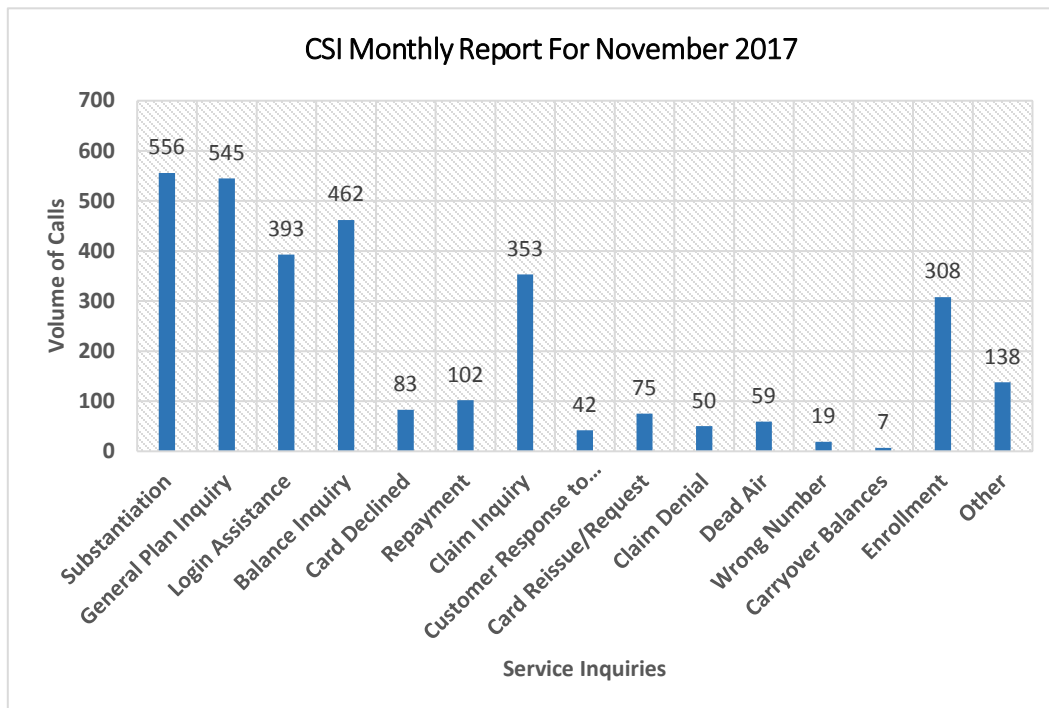
Customer Service Inquiry (CSI) Report For November 2017

Date Period: 11/01/2017 - 11/30/2017

Table 3.1

CSI Monthly Report For November 2017	
Service Inquiries	Volume of Calls
Substantiation	556
General Plan Inquiry	545
Login Assistance	393
Balance Inquiry	462
Card Declined	83
Repayment	102
Claim Inquiry	353
Customer Response to Communication	42
Card Reissue/Request	75
Claim Denial	50
Dead Air	59
Wrong Number	19
Carryover Balances	7
Enrollment	308
Other	138

Graph 5 (Table 3.1)



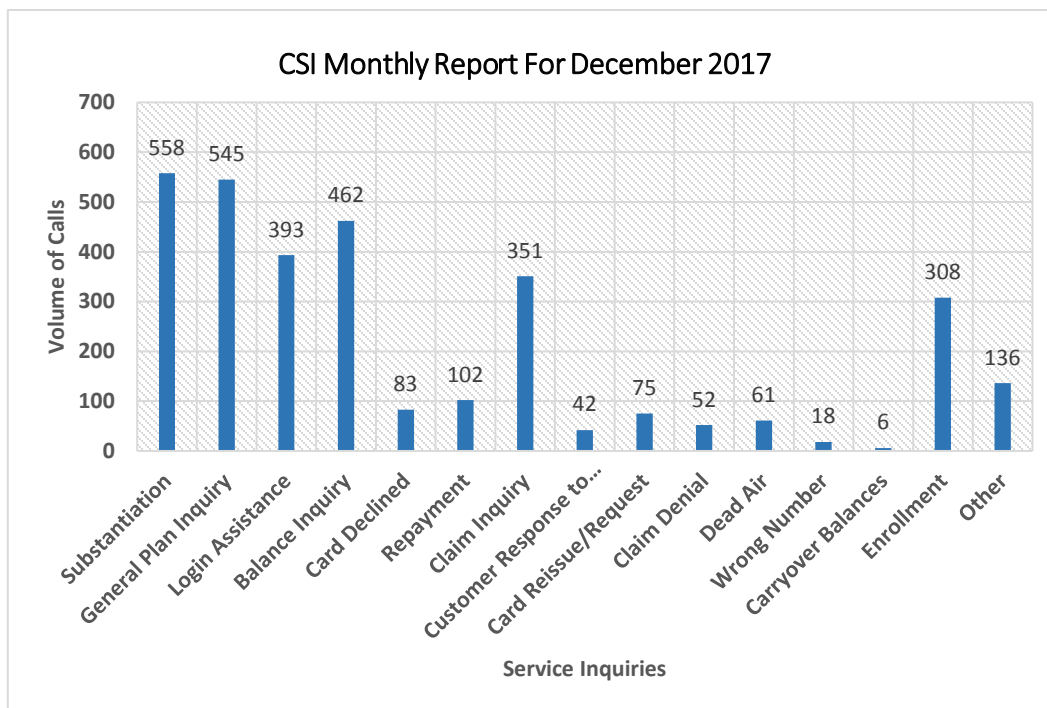
Customer Service Inquiry (CSI) Report For December 2017

Date Period: 12/01/2017 - 12/31/2017

Table 4.1

CSI Report For December 2017	
Service Inquiries	Volume of Calls
Substantiation	558
General Plan Inquiry	545
Login Assistance	393
Balance Inquiry	462
Card Declined	83
Repayment	102
Claim Inquiry	351
Customer Response to Communication	42
Card Reissue/Request	75
Claim Denial	52
Dead Air	61
Wrong Number	18
Carryover Balances	6
Enrollment	308
Other	136

Graph 6 (Table 4.1)



Data Report on Customer Service Inquiry (CSI)

January 1, 2018 through March 31, 2018

Quarter 1



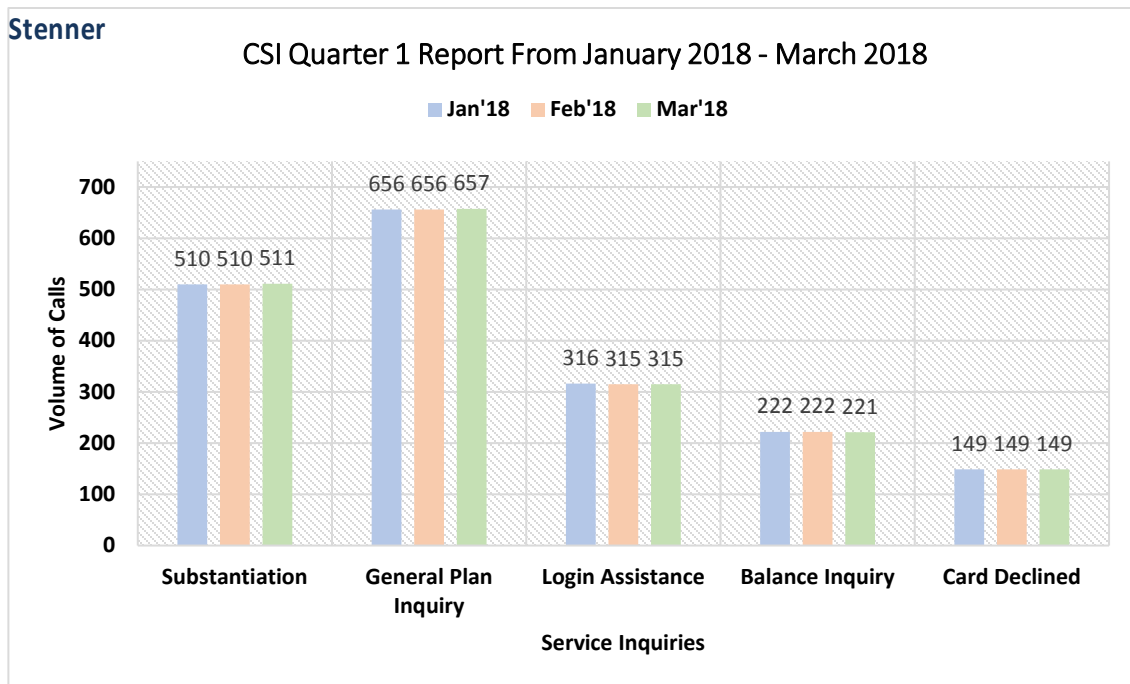
2018 Customer Service Inquiry (CSI) Report - Quarter 1

Date Period: 01/01/2018 - 03/31/2018

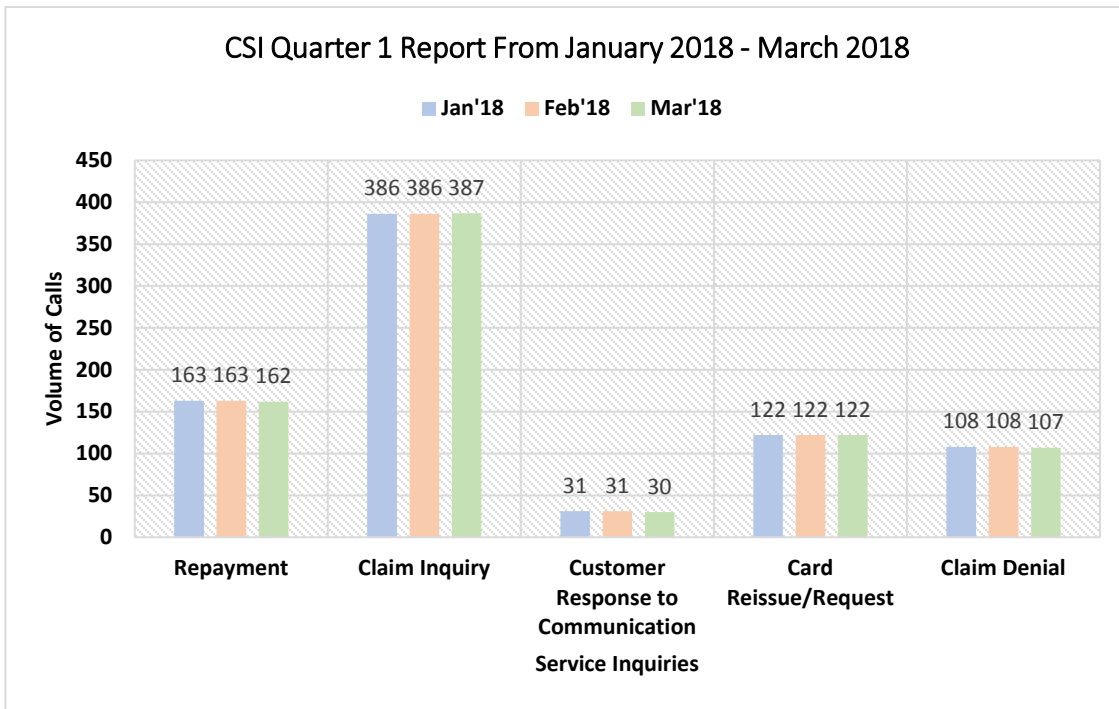
Table 1.1 (1-15 Service Inquiries)

CSI Quarter 1 Report From January 2018 - March 2018				
Service Inquiries	Jan'18	Feb'18	Mar'18	Total Volume of Calls
Substantiation	510	510	511	1531
General Plan Inquiry	656	656	657	1969
Login Assistance	316	315	315	946
Balance Inquiry	222	222	221	665
Card Declined	149	149	149	447
Repayment	163	163	162	488
Claim Inquiry	386	386	387	1159
Customer Response to Communication	31	31	30	92
Card Reissue/Request	122	122	122	366
Claim Denial	108	108	107	323
Dead Air	71	71	70	212
Wrong Number	8	8	8	24
Carryover Balances	19	20	20	59
Enrollment	38	38	38	114
Other	110	110	109	329

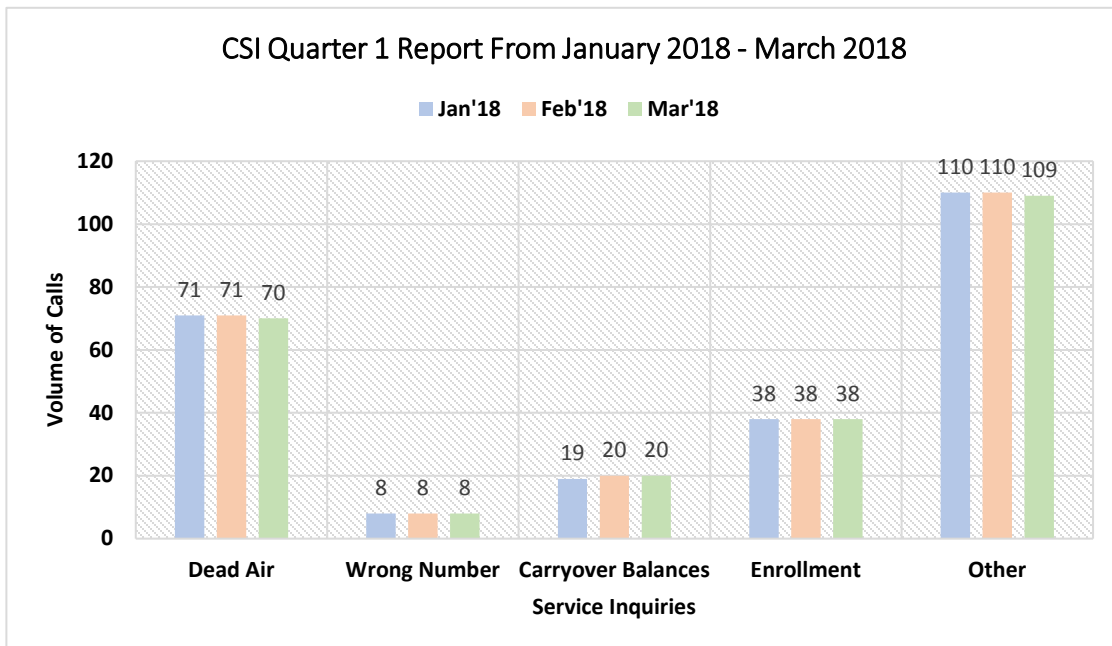
Graph 1 (Table 1.1, 1-5 Service Inquiries)



Graph 2 (Table 1.1, 6-10 Service Inquiries)



Graph 3 (Table 1.1, 11-15 Service Inquiries)



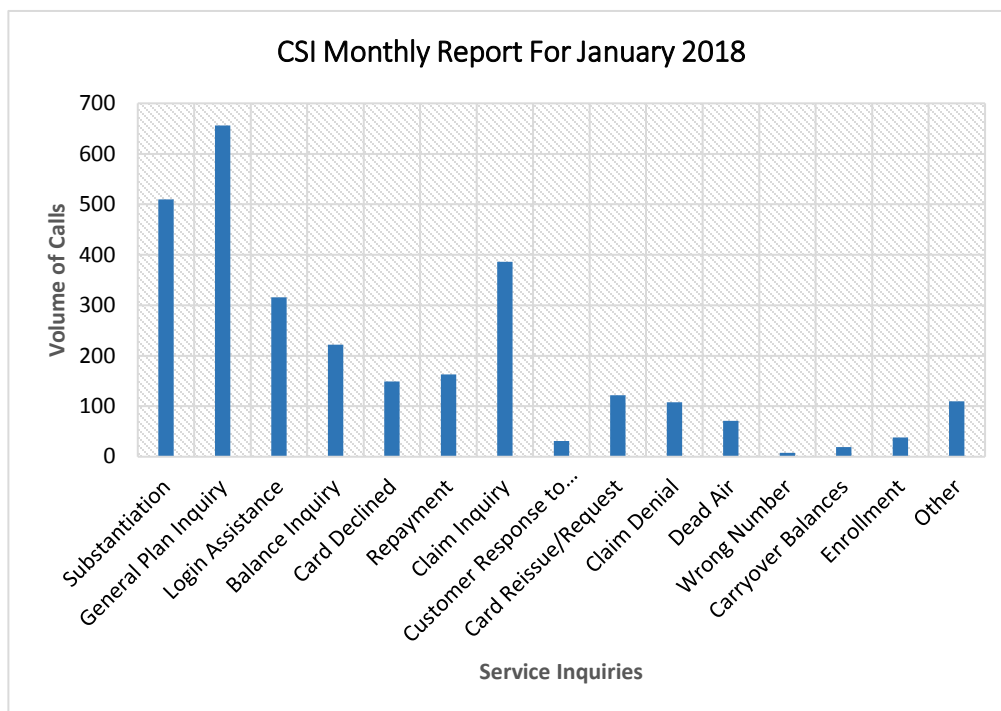
Customer Service Inquiry (CSI) Report For January 2018

Date Period: 01/01/2018 - 01/31/2018

Table 2.1

CSI Monthly Report For January 2018	
Service Inquiries	Volume of Calls
Substantiation	510
General Plan Inquiry	656
Login Assistance	316
Balance Inquiry	222
Card Declined	149
Repayment	163
Claim Inquiry	386
Customer Response to Communication	31
Card Reissue/Request	122
Claim Denial	108
Dead Air	71
Wrong Number	8
Carryover Balances	19
Enrollment	38
Other	110

Graph 4 (Table 2.1)



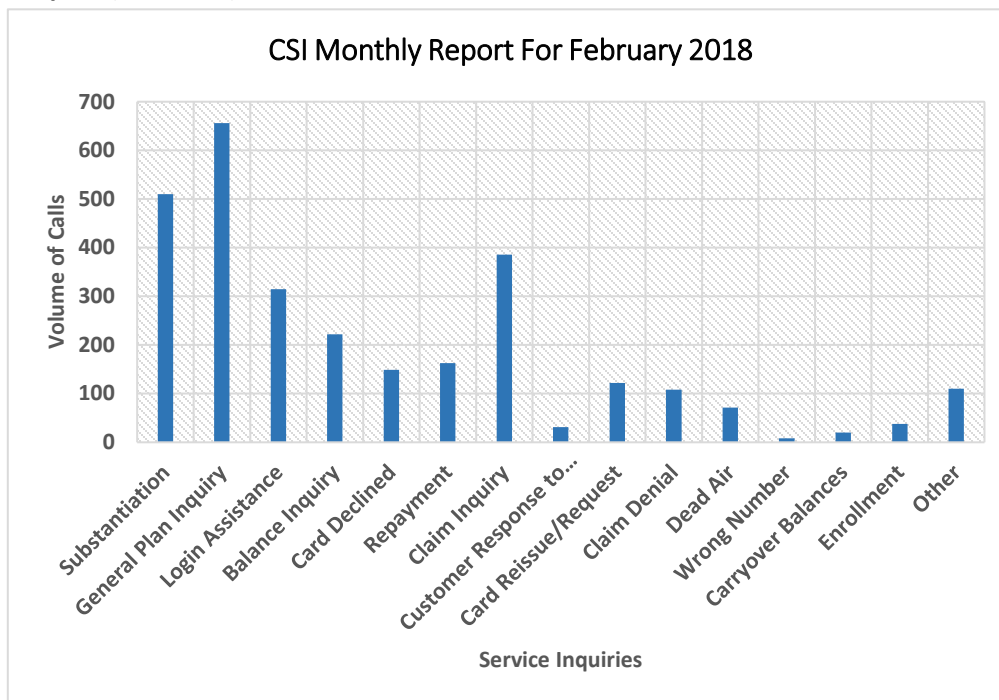
Customer Service Inquiry (CSI) Report For February 2018

Date Period: 02/01/2018 - 02/28/2018

Table 3.1

CSI Monthly Report For February 2018	
Service Inquiries	Volume of Calls
Substantiation	510
General Plan Inquiry	656
Login Assistance	315
Balance Inquiry	222
Card Declined	149
Repayment	163
Claim Inquiry	386
Customer Response to Communication	31
Card Reissue/Request	122
Claim Denial	108
Dead Air	71
Wrong Number	8
Carryover Balances	20
Enrollment	38
Other	110

Graph 5 (Table 3.1)



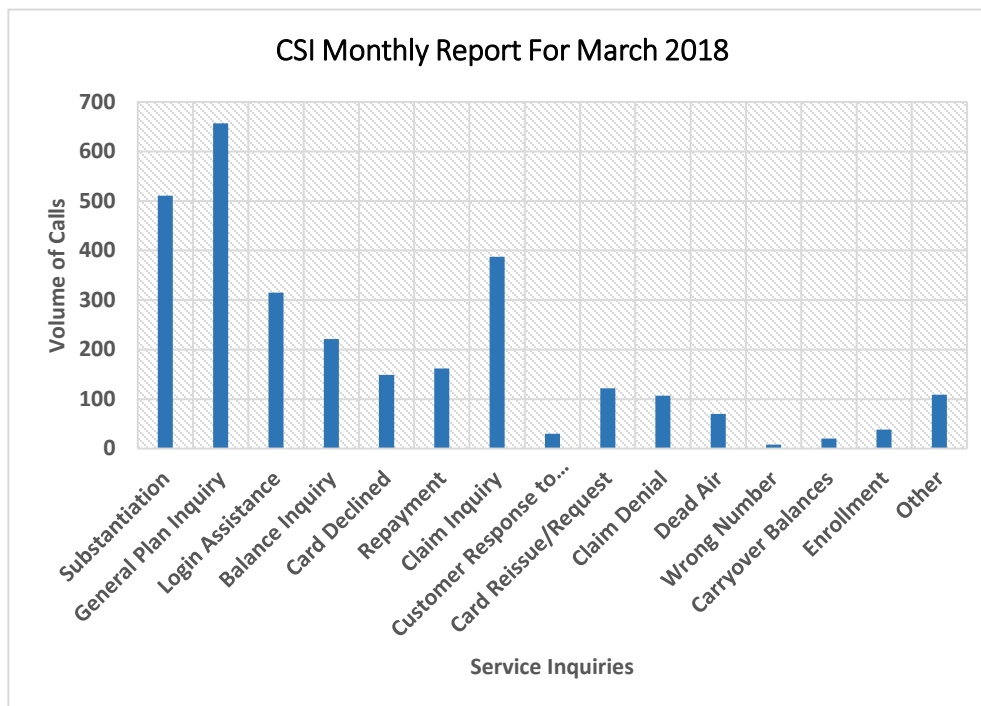
Customer Service Inquiry (CSI) Report For March 2018

Date Period: 03/01/2018 - 03/31/2018

Table 4.1

CSI Monthly Report For March 2018	
Service Inquiries	Volume of Calls
Substantiation	511
General Plan Inquiry	657
Login Assistance	315
Balance Inquiry	221
Card Declined	149
Repayment	162
Claim Inquiry	387
Customer Response to Communication	30
Card Reissue/Request	122
Claim Denial	107
Dead Air	70
Wrong Number	8
Carryover Balances	20
Enrollment	38
Other	109

Graph 6 (Table 4.1)



Data Report on Customer Service Inquiry (CSI)

April 1, 2018 through June 30, 2018

Quarter 2



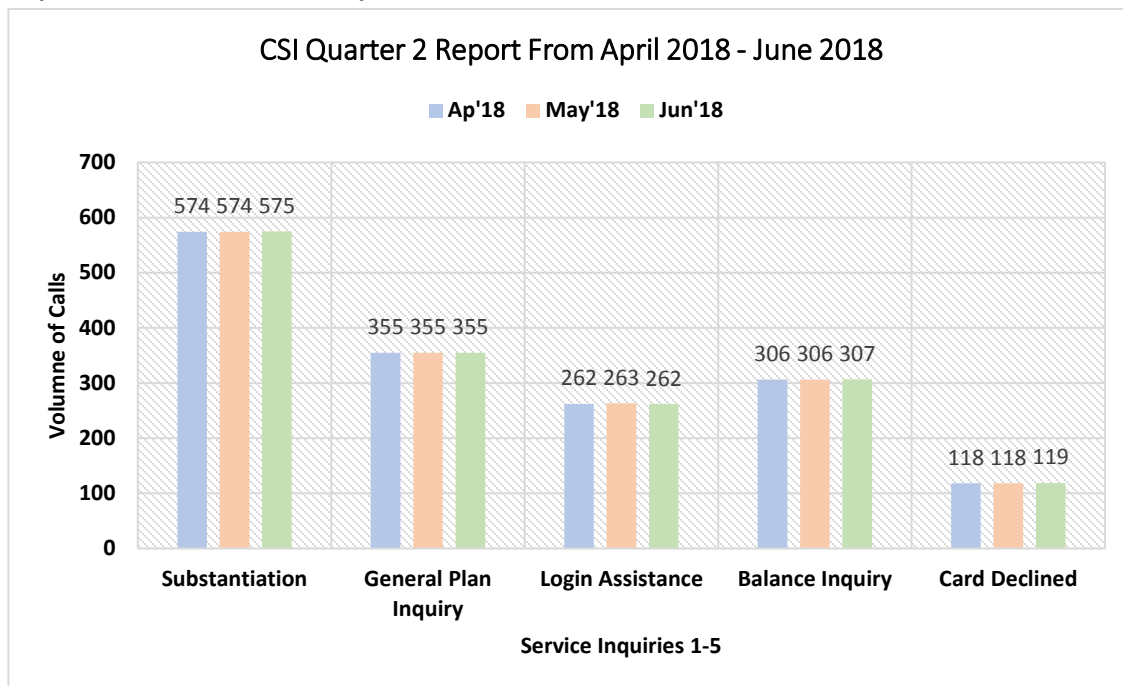
2018 Customer Service Inquiry (CSI) Report - Quarter 2

Date Period: 04/01/2017 - 06/30/2018

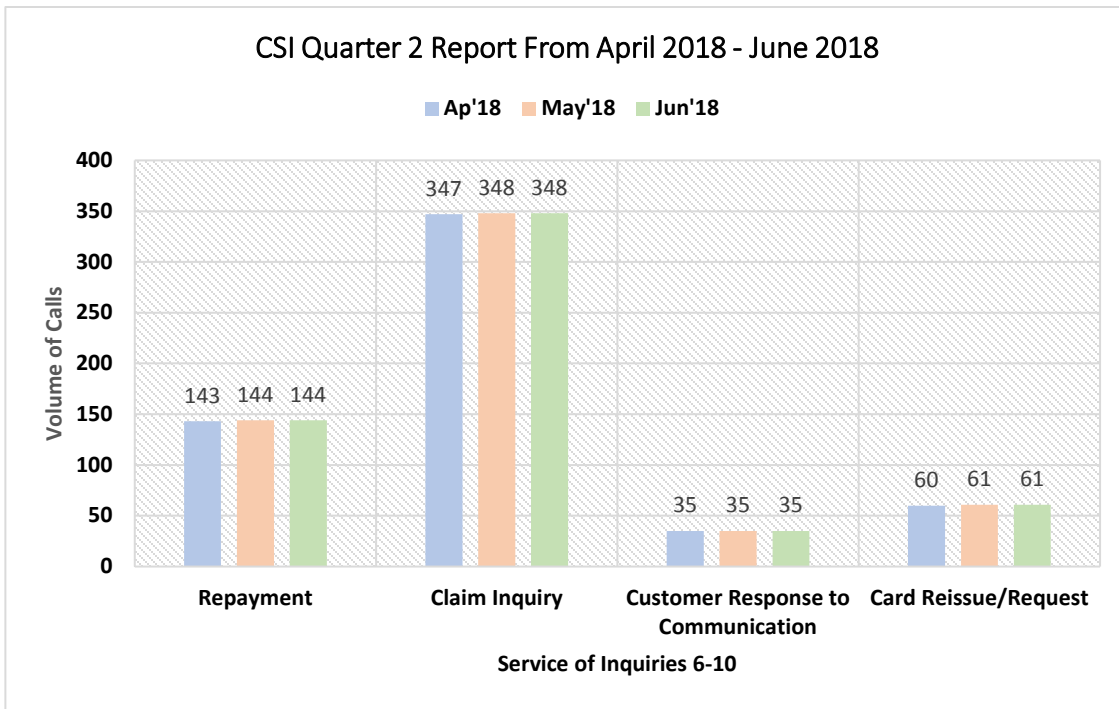
Table 1.1 (1-15 Service Inquiries)

CSI Quarter 2 Report From April 2018 - June 2018				
Service Inquiries	Ap'18	May'18	Jun'18	Total Volume of Calls
Substantiation	574	574	575	1723
General Plan Inquiry	355	355	355	1065
Login Assistance	262	263	262	787
Balance Inquiry	306	306	307	919
Card Declined	118	118	119	355
Repayment	143	144	144	431
Claim Inquiry	347	348	348	1043
Customer Response to Communication	35	35	35	105
Card Reissue/Request	60	61	61	182
Claim Denial	74	75	75	224
Dead Air	34	34	34	102
Wrong Number	9	9	9	27
Carryover Balances	5	5	5	15
Enrollment	11	11	11	33
Other	114	115	114	343

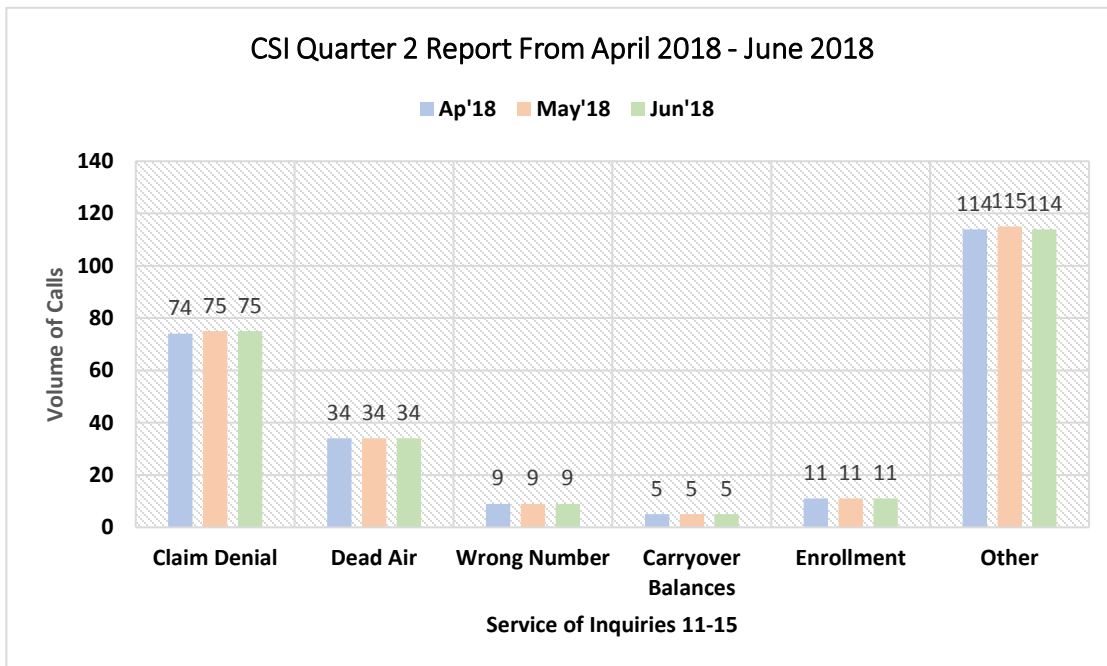
Graph 1 (Table 1.1, Service Inquiries 1-5)



Graph 2 (Table 1.1, Service Inquiries 6-10)



Graph 3 (Table 1.1, Service Inquiries 10-15)



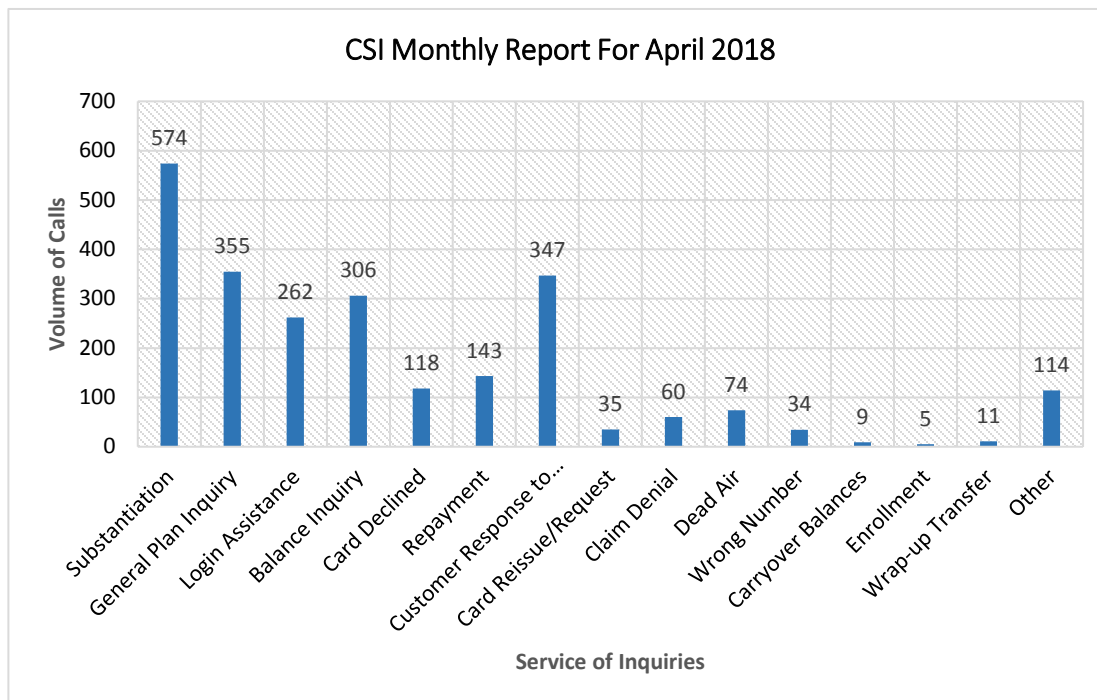
Customer Service Inquiry (CSI) Report For April 2018

Date Period: 04/01/2018 - 04/30/2018

Table 2.1

CSI Monthly Report For April 2018	
Service Inquiries	Volume of Calls
Substantiation	574
General Plan Inquiry	355
Login Assistance	262
Balance Inquiry	306
Card Declined	118
Repayment	143
Customer Response to Communication	347
Card Reissue/Request	35
Claim Denial	60
Dead Air	74
Wrong Number	34
Carryover Balances	9
Enrollment	5
Wrap-up Transfer	11
Other	114

Graph 4 (Table 2.1)



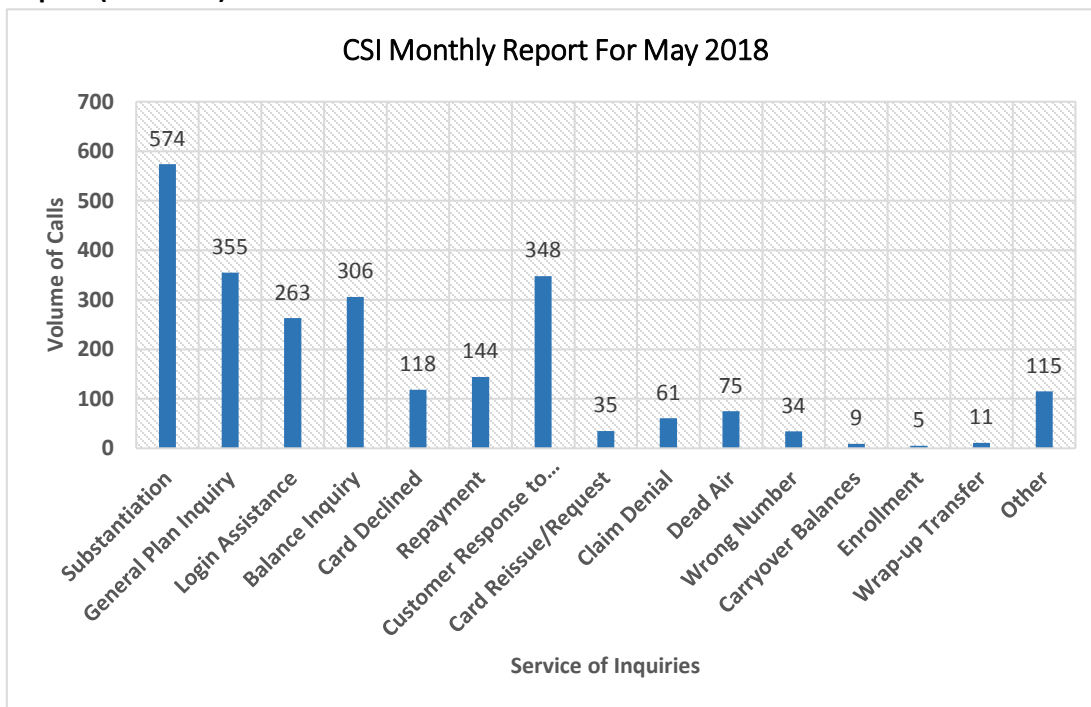
Customer Service Inquiry (CSI) Report For May 2018

Date Period: 05/01/2018 - 05/31/2018

Table 3.1

CSI Monthly Report For May 2018	
Service Inquiries	Volume of Calls
Substantiation	574
General Plan Inquiry	355
Login Assistance	263
Balance Inquiry	306
Card Declined	118
Repayment	144
Customer Response to Communication	348
Card Reissue/Request	35
Claim Denial	61
Dead Air	75
Wrong Number	34
Carryover Balances	9
Enrollment	5
Wrap-up Transfer	11
Other	115

Graph 5 (Table 3.1)



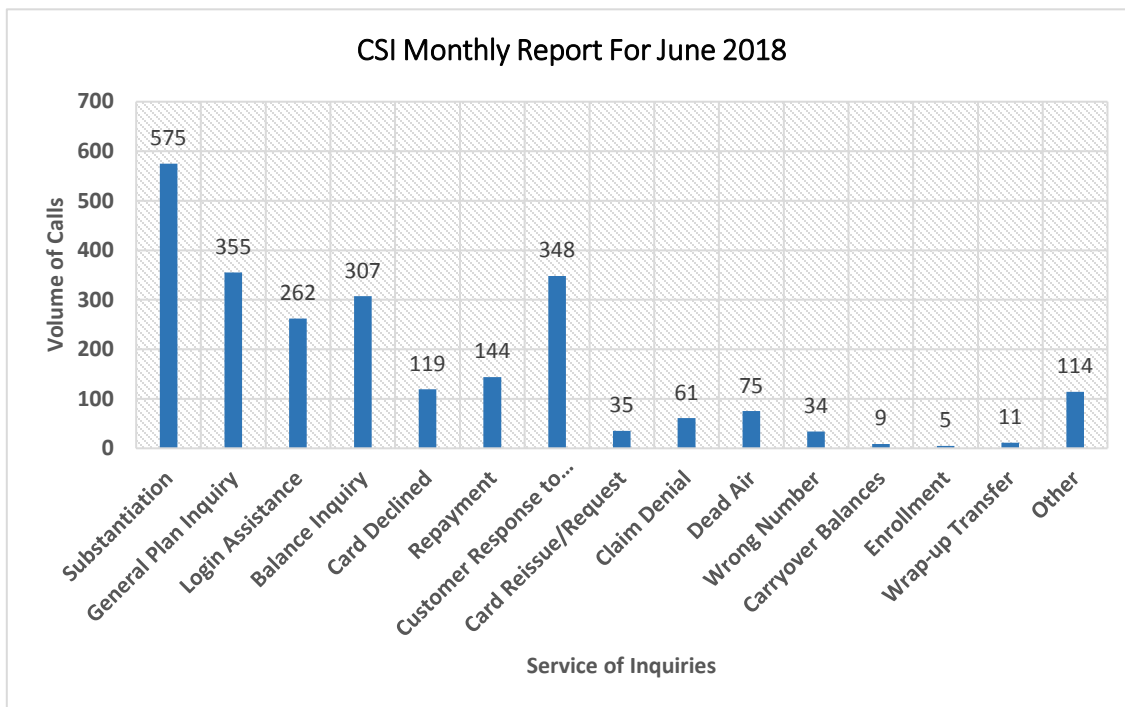
Customer Service Inquiry (CSI) Report For June 2018

Date Period: 06/01/2018 - 06/30/2018

Table 4.1

CSI Monthly Report For June 2018	
Service Inquiries	Volume of Calls
Substantiation	575
General Plan Inquiry	355
Login Assistance	262
Balance Inquiry	307
Card Declined	119
Repayment	144
Customer Response to Communication	348
Card Reissue/Request	35
Claim Denial	61
Dead Air	75
Wrong Number	34
Carryover Balances	9
Enrollment	5
Wrap-up Transfer	11
Other	114

Graph 6 (Table 4.1)



Data Report on Customer Service Inquiry (CSI)
Annual Summary Review
July 1, 2017 through June 30, 2018

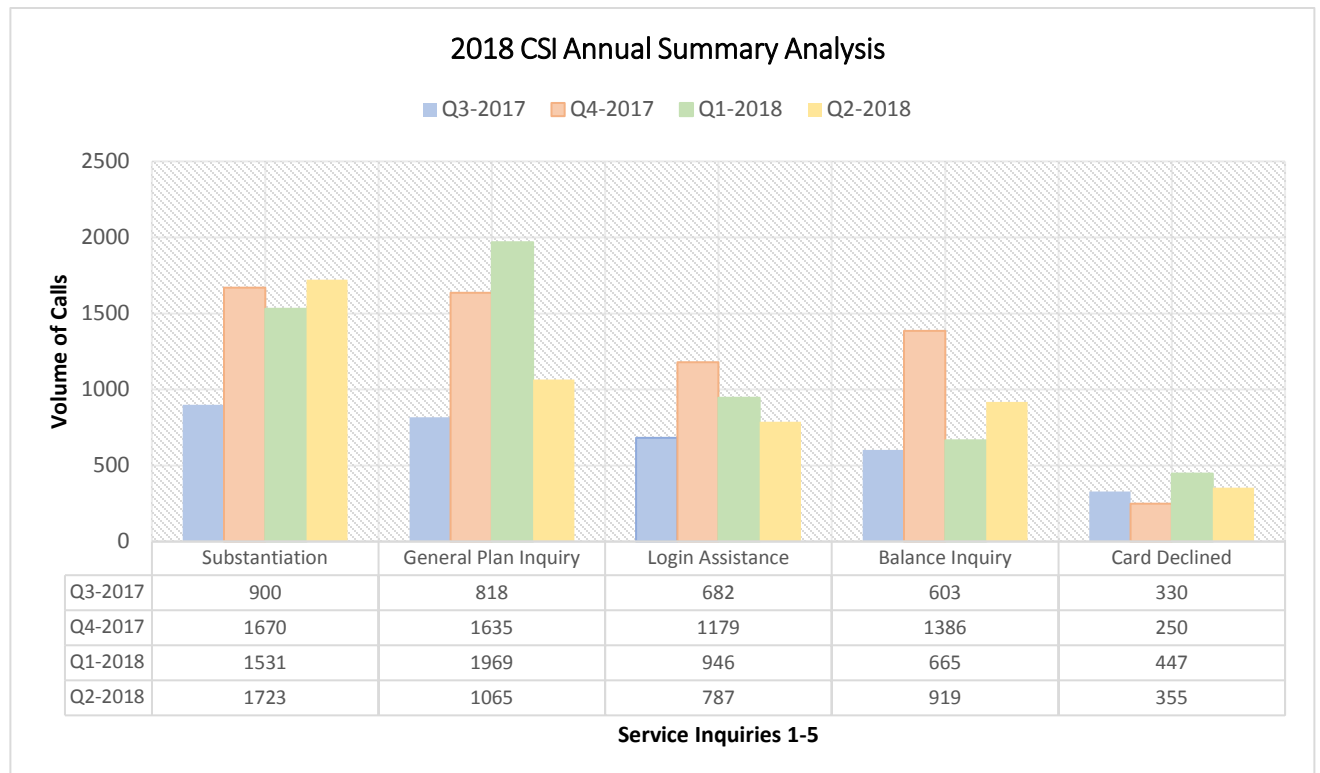


Annual Summary - Quarter 3 2017 through Quarter 2 2018

Date Period: 07/01/2017 - 06/30/2018

Table 1.1 Quarterly Summary

2017-2018 CSI Annual Summary					
Service Inquiries	Q3-2017	Q4-2017	Q1-2018	Q2-2018	Total Calls
Substantiation	900	1670	1531	1723	5824
General Plan Inquiry	818	1635	1969	1065	5487
Login Assistance	682	1179	946	787	3594
Balance Inquiry	603	1386	665	919	3573
Card Declined	330	250	447	355	1382
Repayment	312	306	488	431	1537
Claim Inquiry	444	1055	1159	1043	3701
Customer Response to Communication	77	125	92	105	399
Card Reissue/Request	97	227	366	182	872
Claim Denial	91	152	323	224	790
Dead Air	97	179	212	102	590
Wrong Number	30	55	24	27	136
Carryover Balances	1	20	59	15	95
Enrollment	29	924	114	33	1100
Other	464	410	329	343	1546



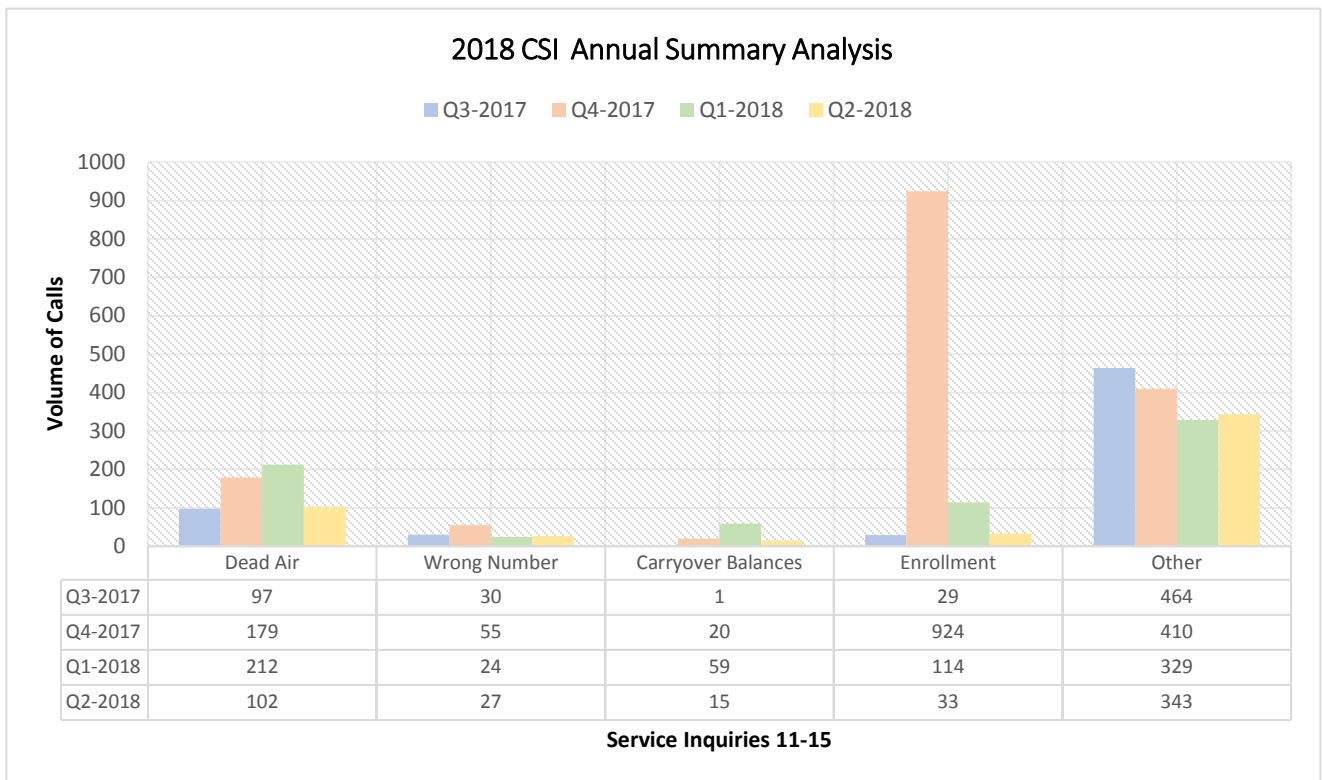
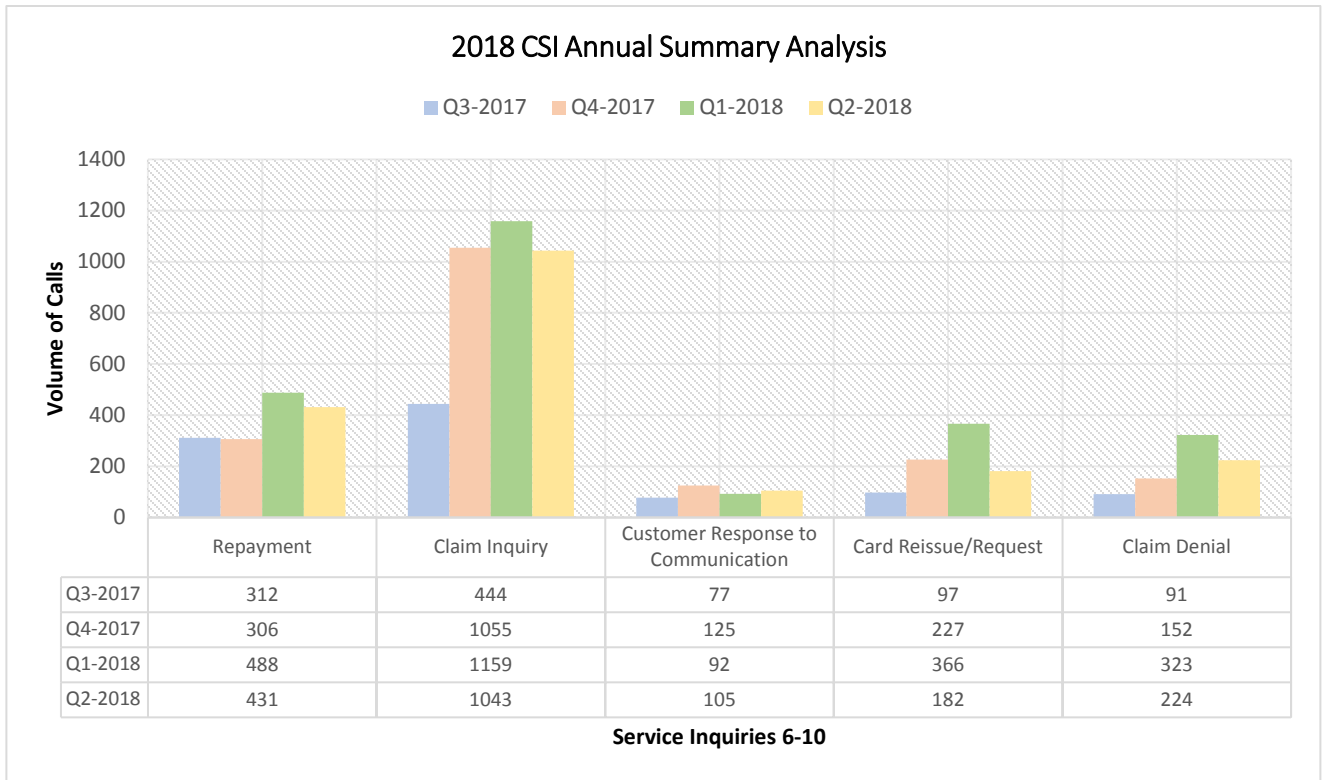


Table 2.1 Volume of Calls Monthly Summary

Service Inquiries	Quarter 3 Volume of Calls			Quarter 4 Volume of Calls			Quarter 1 Volume of Calls			Quarter 2 Volume of Calls		
	Jul'17	Aug'17	Sep'17	Oct'17	Nov'17	Dec'17	Jan'18	Feb'18	Mar'18	Apr'18	May'18	Jun'18
Substantiation	300	300	300	556	556	558	510	510	511	574	574	575
General Plan Inquiry	273	273	272	545	545	545	656	656	657	355	355	355
Login Assistance	409	136	137	393	393	393	316	315	315	262	263	262
Balance Inquiry	362	121	120	462	462	462	222	222	221	306	306	307
Card Declined	198	66	66	84	83	83	149	149	149	118	118	119
Repayment	187	62	63	102	102	102	163	163	162	143	144	144
Claim Inquiry	266	88	90	351	353	351	386	386	387	347	348	348
Customer Response to Communication	46	15	16	41	42	42	31	31	30	35	35	35
Card Reissue/Request	58	20	19	77	75	75	122	122	122	60	61	61
Claim Denial	55	18	18	50	50	52	108	108	107	74	75	75
Dead Air	58	19	20	59	59	61	71	71	70	34	34	34
Wrong Number	18	6	6	18	19	18	8	8	8	9	9	9
Carryover Balances	1	0	0	7	7	6	19	20	20	5	5	5
Enrollment	17	6	6	308	308	308	38	38	38	11	11	11
Other	278	92	94	136	138	136	110	110	109	114	115	114