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Correspondence Memorandum

Date: August 22, 2023

To: Budget and Operations Committee

From: Michelle Baxter, Director
 Office of Enterprise Initiatives

Subject: ETF Modernization Projects Update

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

Below is the Department of Employee Trust Funds (ETF's) modernization project update for the period ending August 31, 2023. This provides the Committee with an overview of the project highlights, health, major milestones, and key issues and risks.

Executive Summary

The Insurance Administration System (IAS) Implementation project overall health is now at risk due to the billing platform issues. To mitigate these issues, ETF has begun planning for developing an in-house solution. Please reference the "Insurance Administration System (IAS) Update" memo ([Ref. GIB | 08.16.23 | 9A](#)), to the Group Insurance Board on August 16, 2023, for additional details.

The Data Management (DM) Program overall is on track and three projects will be completed this year and the overall program closed; one project will remain active through 2024. The focus is on supporting data for the IAS project. There is moderate risk that IAS reporting required to perform business operations will not be readily available on the IAS "go-live" date. The team is prioritizing necessary reporting and the timing in which such reporting is required, deferring non-daily reporting past the "go-live" date. This level of prioritization is normal and there is a planned IAS post go-live period to address remaining reporting needs.

A key dependency to successfully deliver the IAS and ensure members' identities are secure is being accomplished through the Identity Proofing project, Strategic Initiative 4.3.5, and is being reported here for reference. The project has selected a solution and contract negotiations have been completed. The implementation of the solution has been transferred to a workstream within the IAS project (see Member and Employer Portals and Identity Proofing Milestone below).

Reviewed and approved by John Voelker, Secretary
 Electronically Signed 08/28/2023

Board	Mtg Date	Item #
BUD	09.21.23	6

IAS Implementation

Highlights

- We expanded the number of milestones compared to previous memos. The Deployment and Project Closure dates of June 30, 2024, and March 31, 2025, respectively, have not changed. The table provides added transparency of additional milestones in order to meet those dates.
- UW configuration and testing of payroll deductions expected to be completed by the end of August.
- Thirteen local employers are testing the Employer Transaction Application (ETA). Work continues collecting configuration information from more than 900 employers.
- Officially kicked off enrollment and eligibility discovery with DOA STAR, non-STAR agencies and UWHC.
- Phase 3 – Retirees Benefitplace end date has been updated to reflect the revised schedule that was determined during planning; however, it was not previously updated here.

Health

Overall Health	Schedule	Scope	Budget	Transition Management
At Risk	At Risk	On Target	On Target	At Risk

Project Milestones

Milestone	Start Date	Shelving / End Date	Status
Phase 0 – Benefitplace core system	08/09/2021	03/31/2022	Completed 6/30/2022
Phase 1 – UW Benefitplace	08/15/2022	05/18/2023	Completed
Phase 2 – Locals Benefitplace	12/01/2022	06/16/2023	Completed
Phase 3 - Retirees Benefitplace	03/01/2023	11/03/2023 03/31/2024	On Target
Phase 4 – DOA (Star and Non-Star), UWHC Benefitplace	05/01/2023 07/16/2023	01/12/2024	On Target
Billing and Payment Application	12/22/2022	08/29/2024	At Risk
Member and Employer Portals and Identity Proofing	05/03/2023	08/30/2024	On Target
Internal technical work [Employer Transaction Application (ETA), Master Data Management (MDM), Data Conversion]	09/01/2021	12/30/2024	At Risk
Vendor Integrations, Reporting, and Analytics	09/09/2021	12/12/2024	At Risk
Operational Readiness	08/09/2021	06/01/2024	At Risk

Milestone	Start Date	Shelving / End Date	Status
Deployment	01/01/2024	06/30/2024	Not Started
Project Closure	06/01/2024	03/31/2025	Not Started

Top Risk / Issues

#	Risk / Issue Description	Severity	Status
1	Billing – Vendor has an unproven billing solution, and early indications of functionality are concerning.	High	Implementing contingency plan
2	Resources – Maintenance of current system, operational capacity, and competing initiatives	High	Monitoring through enhanced governance oversight
3	Timeline - Program and policy changes to insurance benefit plans or Third-Party Administrators (TPAs) may impact implementation.	Moderate	Monitoring
4	Timeline – Third-Party Administrators (TPAs) and Employer ability to meet defined timelines.	Moderate	Monitoring
5	Operational Readiness - High level of process changes and acceptance of such changes for ETF, Employers and Vendors.	High	Enhanced Transition Management effort underway
6	Operational Readiness – ETF staff roles and responsibilities are defined, end to end processes documented and agreed upon, and staff trained	Moderate	Key roles being defined; priority future state processes identified, training plan and materials being developed

DM Program

Highlights

- DM program overall health is on track.
- Data Storage, Warehouse, and Business Intelligence project is focused on supporting IAS.
- Data Quality is preparing to close.
- Data Literacy published their third season of data bytes, an online training series for internal staff.

Health

Overall Health	Schedule	Scope	Budget	Transition Management
On Target	On Target	On Target	On Target	On Target

Project Milestones

Milestone	Start Date	End Date	Status
Data Storage, Warehouse, and Business Intelligence	11/08/2019	12/29/2023	On Target
Milestone 10 - Organization, Insurance, myETF	07/01/2022	9/30/2022	Complete
Milestone 11 – myETF in Data Lake DEV	10/03/2022	12/30/2022	Complete
Milestone 12 - IAS	01/02/2023	03/31/2023	Complete
Milestone 13 - IAS	04/03/2023	06/30/2023	Complete
Milestone 14 – Data Lake User Documentation	07/03/2023	09/28/2023	On Target
Milestone 15 – DQ Framework v1	10/2/2023	12/29/2023	Not Started
Milestone 16 – DQ Framework: Person and Insurance Domain	1/1/2024	3/29/2024	Not Started
Milestone 17 – IAS go live reporting	4/1/2024	6/28/2024	Not Started
Milestone 18 – DQ Framework: Organization and Finance Domains	7/1/2024	9/30/2024	Not Started
Milestone 19 – IAS Reporting and Financial Subdomain	10/1/2024	11/30/2023 11/29/2024	Not Started
Project Closure	12/01/2023 12/01/2024	12/31/2023 12/31/2024	Not Started
Data Governance	02/08/2019	12/29/2023	On Target
Enhance Data Governance Framework	01/03/2022	12/22/2023	On Target
Operationalize Data Governance Activities	07/01/2022	12/04/2023	On Target
Project Closure	12/01/2023	12/29/2023	Not Started
Data Quality	01/14/2019	12/29/2023 08/31/2023	On Target
Data Quality and Supporting Metrics	01/03/2022	12/29/2023 03/30/2023	Completed
Data quality control points rules prioritization, review, and modification	01/03/2022	12/15/2023 03/30/2023	Completed
Data Cleansing	01/03/2022	10/23/2023	Completed
Future data quality framework*	01/03/2022	12/29/2023 04/30/2023	Completed
Operationalize data quality activities	01/02/2023	12/28/2023 06/30/2023	Completed
Project Closure	12/01/2023	12/29/2023 08/31/2023	On Target
Data Literacy	04/05/2021	12/29/2023	On Target

*Future data quality framework was moved to Data Storage, Warehouse, and Business Intelligence project (see Milestone 15, 16, and 18 above).

Top Risk / Issues

#	Risk / Issue Description	Severity	Status
1	Resource availability – specifically developers, subject matter experts and data stewards	High	Monitoring through enhanced governance oversight and added additional resources
2	Data integration complexity	Moderate	Monitoring

Staff will be at the Committee meeting to answer any questions.