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## **Correspondence Memorandum**

**Date:** November 16, 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 September 30, 2023. This provides the Budget and Operations Committee (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’s overall health continues to be at risk. ETF previously reported risks related to billing platform issues. To mitigate those issues, ETF began development of an in-house billing solution. Since that time, the Benefitfocus team was able to resolve many of the open issues with their vendor’s Certifi Billing solution that caused the concerns. The IAS team determined the Certifi solution was the best choice with which to move forward. The internal billing system development effort has been halted. Additionally, a risk related to the Retirees Benefitplace timeline is being evaluated. Please reference the “Insurance Administration System (IAS) Update” memo ([Ref. GIB | 11.15.23 | 15A](#)) that was presented to the Group Insurance Board on November 15, 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 will be closed; one project will remain active through 2024. Focus is on supporting data for the IAS project. There is moderate risk that IAS reporting required to perform business operations will not be available on the IAS “go-live” date. The team will be prioritizing necessary reporting and the timing in which such reporting is required, deferring non-daily reporting past the “go-live” date if necessary. This level of prioritization is normal, and there is a planned IAS post go-live period to address remaining project needs.

Reviewed and approved by John Voelker, Secretary  
Electronically Signed 11/30/2023

Board	Mtg Date	Item #
BUD	12.14.23	5

A key dependency to successfully deliver IAS and ensure members' identities are secure is being accomplished through the Identity Proofing project, Strategic Initiative 4.3.5, and is reported here for reference. The project team 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 and will now be reported there (see Member and Employer Portals and Identity Proofing Milestone below).

## IAS Implementation

### Highlights

- Enrollment and Eligibility user acceptance testing underway for DOA, Non-STAR, UWHC, and retirees.
- Round one of billing testing has been completed.
- Employer portal testing and member portal requirements development are underway.
- Work continues to build out operational readiness plan and go-live checklist.

### Health

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

### Project Milestones

Milestone	Start Date	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	<del>11/03/2023</del> 03/31/2024	At Risk
Phase 4 – DOA (Star and Non-Star), UWHC Benefitplace	<del>05/01/2023</del> 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

ETF Modernization Projects Update

November 16, 2023

Page 3

Milestone	Start Date	End Date	Status
Reporting	9/26/2023	12/30/2024	At Risk
Operational Readiness	08/09/2021	06/01/2024	At Risk
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	(New) Internal development and data conversion complexity.	High	Monitoring and prioritizing work
2	(New) Retiree workstream – Payroll, data conversion and user acceptance testing timeline.	High	Monitoring through prioritization
3	(New) Reporting	High	Monitoring – prioritizing reports needed before and after go-live
4	(New) Local Employers - Collection of information from over 900 local employers to allow for configuration is required.	High	Monitoring responses and trying to streamline requests
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	Resources – Maintenance of current system, operational capacity, and competing initiatives	High	Monitoring through enhanced governance oversight
7	Timeline – Third-Party Administrators (TPAs) and Employer ability to meet defined timelines.	Moderate	Monitoring
8	Timeline - Program and policy changes to insurance benefit plans or Third-Party Administrators (TPAs) may impact implementation.	Moderate	Monitoring

**DM Program**Highlights

- DM program overall health is on track.
- Data Storage, Warehouse, and Business Intelligence project has been put on hold and all IAS related deliverables have been transitioned to IAS workstream 5.
- Data Quality project has been completed.
- Data Literacy are preparing to close.

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 Hold
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	Complete
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

ETF Modernization Projects Update

November 16, 2023

Page 5

Milestone	Start Date	End Date	Status
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	<del>12/29/2023</del> 08/31/2023	Completed
Data Quality and Supporting Metrics	01/03/2022	<del>12/29/2023</del> 03/30/2023	Completed
Data quality control points rules prioritization, review, and modification	01/03/2022	<del>12/15/2023</del> 03/30/2023	Completed
Data Cleansing	01/03/2022	10/23/2023	Completed
Future data quality framework	01/03/2022	<del>12/29/2023</del> 04/30/2023	Completed
Operationalize data quality activities	01/02/2023	<del>12/28/2023</del> 06/30/2023	Completed
Project Closure	12/01/2023	<del>12/29/2023</del> 08/31/2023	Completed
Data Literacy	04/05/2021	12/29/2023	On Target

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.