



STATE OF WISCONSIN
Department of Employee Trust Funds
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EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
SEPTEMBER 2009

This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from July through September 2009. These accomplishments are linked to the objectives identified in ETF's strategic business plan.

SERVICE

- Completed and implemented Phases 2 and 3 of the Health Insurance Electronic Enrollment, Payment and Validation Project (EVP). Phase 2 created processes that obtain and transmit data between the employer and the Department for payment of invoices, reporting and bank payment information. Phase 3 involved creating an electronic reporting process between participating insurers and ETF, which ensures accurate premium payments. New screens were also developed for Department staff to key payment data for employers using the state's accounting system.
- Created and implemented written instructions and EVP educational training segments using *Articulate* software. The segments, for all participating health insurance employers, were created to ensure that uniform and consistent information is presented to employers to help them comply with Department standards.
- Gathered business requirements for the implementation of Phase 4 of the EVP, which will focus on providing members with a web-based system for enrollment, eliminating the manual paper processes now required.
- Produced two new online recordings for ETF's video library: *Medicare and your WRS Health Insurance Benefits* and *40.65 Duty Disability and Survivor Benefits*.
- Converted more than 5,000 monthly annuity paper checks to participant direct deposit, which will save an estimated \$21,000 annually in postage.
- Edited and released the July 2009 edition of the Wisconsin Deferred Compensation (WDC) newsletter, *MoneyTalks*.
- Completed more than 5,600 employer administration-related transactions, including processing 2,700 beneficiary designations.
- Revised the annual health insurance enrollment materials, including the *It's Your Choice* booklet and various insurance forms, in order to present a more organized, user-friendly product and streamline costs. This effort included reducing the number of paper booklets printed and increasing use of electronic distribution methods.
- Represented the Department at six public meetings/outreach presentations held throughout the state, including constituent meetings in northwest and west central Wisconsin.

Reviewed and approved by Matt Stohr, Office of Legislative Affairs,
Communications and Quality Assurance.

Signature

Date

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- Developed and implemented a “furlough communications plan” in order to inform Wisconsin Retirement System (WRS) members, employers and the general public about the office closure on September 4, 2009, due to a furlough imposed by Executive Order 285.
- Analyzed the frequency and distribution methods of Department newsletters, including the *Trust Fund News*, *It's Your Benefit* and the *Employer Bulletins* in order to identify potential cost-saving strategies and alternate forms of communication. One result: *It's Your Benefit* will be published once a year (instead of three times) and heavier utilization of ETF's Internet site to provide health insurance benefits-related news and information.
- Enhanced the 'Contact Us' portal page on the Department's Internet site to allow easier identification of the sender, which resulted in further streamlining the routing and processing of the incoming messages.

BENEFITS

- Implemented the biennial budget provision that changed the early retirement calculation for part-time non-teaching participants who terminate WRS employment on or after July 1, 2009.
- Created an internal workgroup to implement the Domestic Partners provision in 2009 Wisconsin Act 28 (the state budget bill), which is effective January 1, 2010. The Department is in the process of developing materials for members.
- Worked to incorporate the health insurance benefit changes brought about by Act 28 into the 2010 health insurance contract and program. The changes include health insurance coverage of dependents up to age 27, insurance coverage for treatment of autism spectrum disorder, insurance coverage for contraceptives and services, and insurance coverage of licensed mental health professionals' service. Further, 2009 Wisconsin Act 14 required insurance coverage of hearing aids, cochlear implants and related treatments for infants and children.
- Published online, user-friendly summaries of the provisions of 2009 Wisconsin Act 28 (the state budget bill) and 2009 Wisconsin Act 14. The summaries provided WRS participants and employers with detailed information on each Act's provisions, including effective dates, WRS participants affected and other information.
- Completed Construction Phase 4 of the Lump Sum Payment System (LSPS), resulting in 50% completion of the total project construction. Implementation is scheduled for March 2010. LSPS will automatically calculate and issue payments for the majority of lump sum benefit types, including separations, additional contributions, and basic minimum annuities.
- Used multiple Core and Variable dividend rate scenarios to complete follow-up testing of the Benefit Payments System (BPS) annual processes for annuitant dividends, annuitant Variable transfers, Duty Disability retirement offsets, and legacy applications.

- Identified and implemented changes to the BPS automated monthly annuitant payment process, which will improve efficiency and reduce the level of human intervention.

WORKFORCE

- Initiated a series of comprehensive job shadowing efforts between staff in separate bureaus. The cooperative arrangements, which run for four weeks, help to foster collegiality at the staff level and often lead to process improvements.
- Implemented the Governor's Executive Order that requires state employees to take 16 days of furlough over the biennium ending June 30, 2011. Developed and implemented an ETF Furlough Plan for our employees, requiring five designated mandatory days (three days determined by employees) in fiscal year 2010 and six designated mandatory days (two days determined by employees) in fiscal year 2011.
- Conducted a pandemic awareness exercise to ensure managers are prepared to capture morning reporting data on the status of their employees in the event of a real pandemic or other disaster situation.

MISCELLANEOUS

- Launched a new performance management and statistical tracking system, which will improve data reliability and save affected staff more than 500 hours in manual data entry time per year in the employer administration bureau.
- Developed the Department's audit plan for the biennial period (July 1, 2009, through June 30, 2011) and began implementation.
- Completed a comprehensive audit of the Retirement Calculation (Ret Calc) System, which processes annuitant data and calculates retirement estimates and final annuities.
- Consolidated file and print services to one server to reduce licensing costs.
- Achieved substantial cost savings (as much as a 30% reduction) in the rates that ETF pays for processing work related to its imaging and workflow system, which scans benefit related documents into participant folders.