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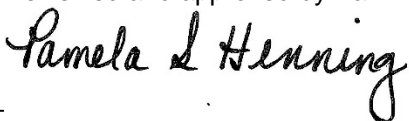
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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
June 2015

This report highlights significant Department of Employee Trust Funds (ETF) accomplishments achieved from January to May in 2015. These accomplishments are linked to the objective identified in ETF's strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Completed many important milestones that solidify the foundations of a successful Benefits Administration System (BAS) Project. These include:

  o Finalizing three solution design documents for BAS Rollout 2, which is set to go live in January 2017. These vital documents relate to Wisconsin Retirement System enrollments, member demographics, employer wage and contribution processing, and insurance enrollments/elections. These solution documents represent the written narrative of the system design work and related design and functionality decisions.

  o Completing five sprint cycles (i.e., design sessions) encompassing more than 150 individual meetings and involving approximately 31 ETF staff members. These sessions related to employer self-service and member self-service websites, with capabilities for group insurance, premium billing/deductions and employer wage and contribution processing.

  o Completing the first version of the *BAS System Security Plan.* This 266-page plan is a significant milestone for the BAS project and based on the latest security National Institute of Standards and Technologies (NIST) standards. The plan will be continuously monitored and updated.

  o Completing the installation, configuration and testing of the servers needed for the BAS staging and production environments.

  o Making strides with data preparation, including: analysis of data for invoicing and payment related to insurance and contributions; data cleansing for Rollout 2; and initial migration of data necessary for Rollouts 1 and 2. Also completed the bridging of data to/from BAS and ETF's legacy applications for Rollout 1.

  o Communicating frequently with all stakeholder groups about the project, including conducting advisory council meetings with third-party administrators (TPA), employers and members; gathering TPA input via design sessions for employer self-service; conducting Rollout 1-focused manager and supervisor forums; and providing frequent staff communications through multiple channels.

Reviewed and approved by Pam Henning, Assistant Deputy Secretary

Pamela L Henning   Electronically Signed 6/8/15

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- o Designing a comprehensive Rollout 1 training plan that meets the needs of staff and TPAs.

- o Implementing comprehensive testing processes that assess the appropriateness of the system design to business requirements, the technical infrastructure and the overall readiness of the BAS solution.

- Converted the *Beneficiary Designation* (ET-2320) form, one of the most frequently used forms, to a fillable online document. The change makes the form easier to use, reduces member errors, and makes processing more efficient.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Launched *WRS News Online*, a quarterly, web-based newsletter providing Wisconsin Retirement System (WRS) benefit and investment news and information specifically for active WRS employees. The print *WRS News* is now solely for WRS retirees. This change allows ETF to customize content to meet the needs of members and provides significant cost savings by decreasing the volume of printed newsletters.

- Created the Department's Twitter account: @WI_ETF. With social media, we are able to expand the reach of our communications, increase accessibility and timeliness and engage members on a different level. Weekly Twitter messages increase awareness about retirement, insurance and other WRS benefits information.

- Launched EMPOWER, a year-long educational campaign to increase awareness of and improve retirement security among female public employees. Project partners include multiple state agencies, the Women's Institute for a Secure Retirement, Wisconsin Women's Council, Summit Credit Union, Wisconsin Department of Financial Institutions and the University of Wisconsin Center for Financial Security. Quantifiable success criteria have been identified and will be reported at the conclusion of the campaign and periodically thereafter.

- Developed and implemented a new telephone call flow design for employers, an improvement that saves time and effort for both employers and ETF staff.

- Convened the first meeting of the Member Advisory Council, a group comprising of active employees and annuitants. The group provided feedback on the format and content of the new BAS home page.

- Conducted the first in a series of webinars for employers on insurance topics.

STRENGTHEN INTERNAL WORKFORCE TRAINING

- Completed the ETF Academy, a training program for ETF trainers and outreach staff, intended to enhance proficiency with the principal software and computer programs used on the job.

- Developed several online training modules for new staff, a beginning step toward replacing the in-person training sessions long used for new employee orientation. This new approach (online versus in-person) was developed based on employee feedback.

- Increased productivity and communications for managers, lead workers and others by completing the Mobile Device Deployment project, replacing more than 80 staff desktop computers with laptops and tablets.

OTHER ACCOMPLISHMENTS

- Completed software changes to annuity payroll software to account for recent tax changes and the upcoming move to the new state ERP/PeopleSoft system, STAR.

- Implemented an improved, fully-automated process to receive, verify and update key Social Security-related data passed from the health plans to ETF.

- Implemented security measures to protect members possibly affected by the Anthem data breach.

- Created a new and improved version of the annual disability report for presentation to the Employee Trust Funds Board, providing a more holistic view of the disability annuity and duty disability programs.

- Turned on WIFI for our members' use while waiting for appointments at our Badger Road offices.

- Reduced production support requests to a fraction of what we experienced last year by working with ETF's Change Control Board to reduce changes and by implementing regression testing.

- Substantially improved the IT Help Desk's responsiveness by switching to an online system, accessible to all employees, for tracking, responding to, and resolving issues.

- Improved the process for expediting the release of non-medical information to a third party, resulting in better service and faster turn-around time. The new process has made it possible to consistently meet processing goals and enable same-day service for most requests.

- Redesigned the Careers section of the ETF website to include a welcome message to new and prospective employees from Secretary Bob Conlin, focus on the Department's mission and core values, and showcase in-house talent with testimonials and photos of real ETF staff.

- A cross-functional workgroup, with representation from different business areas, revised the Department's vision and began developing the strategic goals that will be a part of the 2015-2019 Strategic Plan.