STATE OF WISCONSIN
Department of Employee Trust Funds
Robert J. Conlin
SECRETARY

Wisconsin Department
of Employee Trust Funds
PO Box 7931
Madison WI 53707-7931
1-877-533-5020 (toll free)
Fax 608-267-4549
etf.wi.gov

EXECUTIVE COMMITTEE ACCOMPLISHMENTS REPORT June 2018 - August 2018

This quarterly report highlights significant Department of Employee Trust Funds **operational** accomplishments – daily business activities, process improvements, successes and milestones – achieved from June 2018 through August 2018.

FINANCIAL STEWARDSHIP (maintaining compliance; administering program benefits for members and employers)

- Created a MEBS Roadmap (2018) Project for prioritizing the efforts needed in the MEBS system, which manages insurance enrollment, billing and payment needs. The top priorities are:
  - Implementing Medicare Advantage split contracts, allowing a participant's family plan to cover both individuals in the Medicare advantage plan and those with non-Medicare health plan coverage.
  - Tracking employers' income continuation insurance enrollments.
  - Implementing a plan to move the current wellness incentive, for those who complete defined wellness tasks, from a gift card to applying the incentive amount to lower insurance premiums.

- Working with ETF consulting actuaries, completed actuarial valuations as of December 31, 2017, and determined 2019 contribution rates for the WRS, sick leave conversion credit program, duty disability insurance and income continuation insurance.

- Completed the 2017 contract compliance audit and the annual Wisconsin Deferred Compensation Program financial report as of and for the year ended December 31, 2017. Both received an unqualified, or "clean", opinion.

- Clarified the policy for escrowing sick leave credits and developed employer and employee training regarding the sick leave program. Components of this effort include:
  - Updated all brochures to reflect the requirements for escrowing sick leave.
  - Published a three-part video series, a reference document, and set of frequently asked questions.

- Placed 36 disability retirement calculations on the June payroll – the highest volume completed in recent history.

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary
Pamela L Henning
Electronically Signed 9/11/18

Board	Mtg Date	Item #
EXC	9.20.18	4A

- Took over the calculation of supplemental WRS contributions for LTDI recipients in August, a process that was previously done by Aetna.

- Wipfli, LLP completed a compliance audit of the Income Continuation Insurance program.

QUALITY AND VALUE (incorporating documentation, testing, risk management; expanding metric-based decision-making; process improvements)

- Commenced a Business Intelligence Project to answer the strategic plan's call to expand metric-based decision making by developing a holistic approach to ETF data management and reporting. The team's first steps include analysis of ETF's data how it is stored and assessing ETF's data-related needs.

- Hired an experienced Business Intelligence (BI) manager to lead ETF's development of a new BI and data management competency that will better enable management to identify opportunities for improvements to internal operations and member customer service.

- The Call Center created and successfully tested a new Voice Over Internet Protocol (VOIP) compatible Customer Location Alternate Routing (CLAR). CLAR is the back-up system used to maintain Call Center operations if Call Center Anywhere (CCA), the system that routes calls, were to fail.

INNOVATIVE SOLUTIONS (broader efforts to integrate systems, increasing security and flexibility)

- Contracted with Orion Development Group to provide sustainable business process management consulting to:
    - Establish a foundation, including standards, resources and skills, to make business process management a sustainable asset for ETF,
    - Build on that foundation via additional training and project execution, and
    - Sustain and grow a cultural shift to provide business process redesign and lean process improvement throughout ETF.

- Initiated an Enterprise Request Process Project. This project will revamp and streamline the current project intake process creating a straightforward system to address all incoming ideas, change requests, projects, bugs, enhancements, and incidents.

- Started an Appointment Scheduling Project. Scheduling a Member Services appointment currently is a process ranging from 32 to 60 steps. This project will create an efficient process the entire agency can use for scheduling appointments.

- Developed and implemented ETF's Information Security Incident Response Plan based on industry standards that cover the most probable computer security incidents.

- Chartered and kicked off the ETF 20 Information Security Program – this takes the industry's most recommended security controls, compares ETF's current maturity in these areas and develops the right projects to further enhance ETF's information security.

- Prepared external training materials and initiated communication to more than 2,300 external users in preparation for DET's deployment of Cayosoft software, the new IAM Account Management Tool. Cayosoft is a tool for all state agencies, TPAs and WRS employers that administer our programs and access ETF systems. To date over 1,500 external users have migrated to Cayosoft.

CUSTOMER ENGAGEMENT (educating and communicating with customers to meet their needs; enhancing employee skills, collaboration, productivity)

- Empower Retirement, the Wisconsin Deferred Compensation (WDC) program contract administrator, released a new version of the WDC website, which includes an estimated "lifetime retirement income score" that helps members determine if they are on track for a secure retirement.

- Began offering members the option to meet with a local WDC representative at the Hill Farms State Office Building for individual appointments. These appointments have become especially popular among staff at Hill Farms-based agencies.

- Participated in a week-long discovery session with web-services provider Palintir. Information collected during these sessions will develop a comprehensive proposal for Phase 1 of redesigning etf.wi.gov, ETF's public facing website.

- Completed the Lynda.com integration with LaDR which provides our staff with over 6,700 video training courses to choose by searching or organized by topic-focused playlists.

- Kicked off a Plain Language Series pilot group which focuses on training staff to present complex benefit information in plain, easy-to-understand wording rather than specialized jargon.

- Improved the automated email that is sent to members who schedule an appointment. The email has been condensed from three pages to a one-page confirmation that is easier to understand and more user friendly.

- Performed a process improvement to streamline the ACH process, which enables direct deposit of monthly annuity payments into annuitant bank accounts. The effort resulted in improved internal communication between business units and a consistent process to provide members with better service.

- Revised the member presentation “Nearing Retirement,” focusing on members within five years of retirement. Improved visuals and added content on insurance based on member feedback.