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EXECUTIVE COMMITTEE ACCOMPLISHMENTS REPORT March 2020 – May 2020

This quarterly report highlights significant Department of Employee Trust Funds **operational** accomplishments – daily business activities, process improvements, successes and milestones – achieved from March 2020 through May 2020. All accomplishments relate to the four goals in our current strategic plan.

EFFORTLESS CUSTOMER EXPERIENCE (increasing employer competency for managing benefits; increasing member personalization for managing their benefits)

- Added a COVID-19 resource center to etf.wi.gov to address frequently asked questions and provide timely information about, coverage for testing, treatment and telehealth, annuitants returning to work in critical positions and other benefits-related topics.

- Created dashboards for Call Center supervisors to monitor call agent performance, including data for call survey results and logged time for answering calls, breaks, meetings, emails, and processing. The results are used along with other information to provide regular feedback to call agents in an effort to help improve the ETF customer experience.

- Completed the transfer of Health Savings Account (HSA) balances from previous vendor, TASC, to current vendor CYC. A total of 5,530 unique HSAs were transferred without delay and were made available to participants in late February.

- Launched an ongoing employer survey via the CenturionCARES call system aimed at gauging employer satisfaction on how ETF staff communicate with the customer. This survey provides input on possible areas for customer service improvement and obtain feedback on usefulness of ETF's website.

- Rolled out a new educational video about the WRS annual Statement of Benefits.

- Successful first use of pre-recorded content during a live webinar. Referred to as 'push play' methodology, the live specialist introduces and then plays the recorded content, delivering a highly refined and consistent 'live' webinar experience to members. Member questions are answered by the specialist after the recording ends. This approach improves consistency and will be applied over the next year, as more pre-recording of webinar content is completed.

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary
Pamela L Henning
Electronically Signed 6/4/20

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EXC	6.17.20	4A

- Successfully transitioned during the COVID pandemic from in-person to virtual member appointments, while also adapting to fully functioning work from home for all other types of duties in the Member Services Bureau.

- Launched a project to locate inactive members who have “lost contact” status with ETF. To date, more than 800 of these members, who range in age from 26 to 80, have been located and informed of their WRS benefits. At a time when so many are out of work, discovering that they have some sort of WRS benefit has been welcomed news for many.

PERFORMANCE MEASUREMENT AND PROCESS MANAGEMENT (expanding metric-based decision-making to optimize key capabilities; expanding business process management to improve operations and support innovation)

- Created a new quarterly web metrics report using Google Data Studio to measure levels of user engagement for etf.wi.gov. The report is also available as an interactive, online data dashboard with drill-down capabilities. Examples of metrics include new users, page views per session, PDF downloads, search topics, top viewed pages, to and from pathways, and bounce rate.

- Implemented a process to improve the data integrity of the state ICI enrollments in preparation for the creation of an ICI database. Files submitted by UW, UWHC, and Central Payroll were compared to ETF’s electronic employee files to validate basic ICI participation. The effort resulted in:
    - Identifying discrepancies
    - Researching each employee’s electronic file for additional verification
    - Collaborating with these employers to obtain enrollment forms.

- Completed a systems modification enabling staff to manually request an updated ET-4414 *Notice to Applicant* for members when termination/effective dates change. Previously, application information had to be canceled and re-entered with the new termination/effective dates for an updated ET-4414 to be generated. The change eliminates that process.

- Moved the income and medical recertification mailings to LTDI and 40.63 Disability annuitants in house. This task was previously performed by the ICI third-party administrator.

- Completed the LTDI annual salary adjustments and Duty Disability annual offset adjustments for 2020.

- Successfully completed two payroll cycles while the majority of ETF staff performed their duties while working from home in response to the COVID-19 pandemic. This was achieved through modifying processes to optimize usage and delivery of electronic documents among staff and prioritizing essential functions for in-office staff.

- Updated the process that analyzes 40.63 Disability Annuity creditable service reporting variables in a member's last year of service. This change allows staff to identify and pro-actively resolve reporting issues with employers prior to finalizing benefits; reduces delays between the 40.63 benefit approvals and final calculations; and reduces the number of annuity corrections.

- Implemented dashboards for HelpDesk staff to improve efficiency of tracking individual and section performance and reporting key metrics for operational level targets. These dashboards have been particularly useful during the pandemic when staff are doing remote work.

- Implemented a hybrid project management approach that incorporates the best of both agile and waterfall approaches for managing internal IT projects.

- Implemented a new version of the Technical Architecture Review Committee (TARC) to help improve ETF's ability to manage the selection and implementation of technologies used in the agency. TARC ensures that ETF technology resources are acquired and used responsibly.

- Closed calendar year-end 2019, which included reconciling employer accounts, calculating the WRS effective interest rate and applying interest to members accounts.

- Working with ETF's consulting actuary, prepared the 2019 valuation of retired lives, which determines the annuity adjustments, and prepared the 2019 valuation of active lives, which is used to determine 2021 WRS contribution rates.

- Completed the annual Wisconsin Deferred Compensation Program financial statement audit for the year ended December 31, 2019, receiving an unqualified (i.e., "clean") opinion.

- Completed year end 2019 tax reporting for WRS annuitants.

- Implemented the Its Your Choice (IYC) Open Enrollment Activity ARK (Act, Ready, Know), a resource tool to communicate key Open Enrollment deadlines and deliverables to the agency.

- Developed for the Human Resources team new dashboards that reflect a plethora of frequently used data sets, an improvement that will, in turn, save significant amounts of time needed to generate reports and queries.

TALENTED AND AGILE WORKFORCE (attracting, integrating and advancing top talent; advancing employee development through meaningful performance management approaches)

- Successfully implemented an agency-wide Work from Home response strategy to the COVID-19 pandemic with minimal issues. As a result of agency-wide preparedness efforts, staff had the necessary IT equipment and support, essential on-site staffing in place, and leadership communication and guidance needed to maintain -- and, in some areas surpass -- operational performance targets.

- Deployed a "Total Rewards" employee benefits calculator that will estimate and display the total quantifiable monetary value of the salary and benefits offered to current and potential employees for our available positions, located under the "Careers at ETF" section of the ETF website.

- Filled a number of key positions, including:

  - An application architect that will help design and implement systems included in ETF modernization projects.
  - A Quality Assurance lead to focus on modern methods and technologies to assist in quality and testing for ETF's new modernized systems.
  - A helpdesk service support technician.
  - An Identity and Access Management contractor that focuses on our user information security.
  - Pharmacy Benefits and Health Program Manager positions.

- Trained business analysts and business area process owners on how to develop outcome performance metrics for ETF's processes.

- Completed a Business Process and Analysis Playbook that will guide and aid ETF's business analysis activities in an effective and uniform manner across business areas.

MODERN, SECURE AND RESILIENT INFORMATION TECHNOLOGIES (developing and deploying customer-focused solutions; integrating systems and processes for seamless, timely and secure stakeholder experiences)

- Implemented the Information Risk Management Program, which is currently focused on creating information security standards and processes that support and align with ETF's modernization initiatives.

- Completed a project to improve monitoring and filtering of ETF user internet traffic. The project resulted in a significant improvement in the ability to protect ETF laptops, particularly as most employees are working from home during the Safer at Home Order.

- Implemented a technology that searches for files containing sensitive data on ETF computing devices. Employees can now be notified, view the location of sensitive data and take protective actions to better secure the information.

- Developed a three-year agency data strategy that aligns with ETF's strategic goals. The data strategy defines ETF's desired future state and program milestones for data quality, master data management, data governance, data integration, reporting/analytics, and culture.

- Launched a technology integration program to support the modernization effort and continue to evolve and grow the underlying technology function. This program will enable specific capabilities that will allow ETF to implement and support leading-edge practices for development and security management, and strategic alignment.

- Developed a quality and test plan template to be used across modernization projects, to help ensure consistent quality, security and integrity of ETF's data and modernized systems both during and after implementation.

- Launched a technology program within the Modernization effort, to implement a new IT Operating Model.

- Completed the implementation of Phase 1 of the Appointment Scheduling software, called Q-flow. This application streamlines and automates appointment scheduling for Call Center and Member Services staff, offering appointment confirmations, text message reminders and easier appointment check-ins.

- Enhanced the system used by local government employers participating in the group health insurance program to obtain annual GASB 75 retiree information. The change included security enhancements and more efficient access to the data.

- Successfully implemented Phase II of CenturionCARES. Upgrades include comfort messaging while members are in queue providing important information; integrates CARES with ETF's system using IAM password; and transfers calls to other areas while retaining member pre-authenticated information.

- Developed a Request for Proposal for implementing an Insurance Administration System. ETF expects to send the letter of intent to award the contract in late summer.

- Conducted remote, multi-day, joint application design sessions on image migration to direct the development of ETFs OnBase implementation, which will manage the imaging and workflow functionality of the system.

- Launched the final two projects of the data management program to establish and operationalize an enterprise data management structure and architecture. The four projects are:
    - Data Management Project 1 – Current-State Data Source and Flow Analysis and Future-State Data Source and Flow Design
    - Data Management Project 2 – Technical Architecture and Integration
    - Data Management Project 3 – Data Storage, Warehouse, and Business Intelligence, and
    - Data Management Project 4 – Data Governance, Master Data Management, and Data Quality

- Kicked off a project to build, improve and share process knowledge from a central online repository. The related software will turn complex process maps, Visio charts and procedure documents into clean, simple process maps that all staff will be able to locate and understand.

- Completed annual processing and delivered the WRS annual Statement of Benefits to all inactive members and state employees. Developed plans to mail statements directly to local employees in response to changes made by delivery services due to the COVID-19 pandemic.

- Developed a monthly modernization newsletter and companion SharePoint site to inform staff current on Modernization activities.

- Developed and initiated a data improvement plan for each health plan to improve the overall quality and completeness of the data warehouse.

- Worked jointly with Securian to roll out a new process for accessing, reviewing and confirming life insurance verifications, enrollments, etc.