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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
March 2022 – May 2022

This quarterly report (March 2022 through May 2022) highlights the Department of Employee Trust Funds highest-value strategic and operational accomplishments, including daily business activities, process improvements, successes, and milestones. 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)

Employer

- Presented the 5th annual ETF Update for state employers, attended by 134 state employers who were briefed on 2023 benefit changes, the Edvest plan, and the Life Insurance program.
- Created new training for the Life Insurance program for local employers.

Member

- Launched the new ETF Web Forms application, which gives members convenient, secure, 24/7 access to a disability retirement estimate online. This new approach may be further developed to expand the online forms available for member self-service and will expand security measures for future Insurance Administration System users.
- Received Group Insurance Board (GIB) approval to implement an initiative on Specialty Drugs and Site of Care, which is an effort to study how to keep the cost of specialty drugs and their administration low without disrupting the quality of service. The GIB also approved moving forward with a Clear Bagging Program for 2023, which allows a provider’s specialty pharmacy to dispense a member’s specialty drug prescription and bill through the pharmacy benefit rather than the medical benefit with a goal of lower cost to the overall program
- Achieved the highest level of customer engagement in 2022 for the Well Wisconsin Program compared to any of the prior years. At an aggregate level, individual engagements to date have increased by 5.7% compared to 2021 and 103% compared to 2020.

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary
 Electronically Signed 6/7/22

Pamela L Henning

Board	Mtg Date	Item #
EXC	6.22.22	4A

- Successfully completed mailing of the January 1, 2022 Annual Statements of Benefits, which were sent to:
 - 54,119 University of Wisconsin active employees, and another 29,846 were made available through their online employee portal.
 - 169,219 other active employees
 - 151,747 inactive employees
 - 3,329 alternate payees

Employers and Members

- Developed and implemented dashboards supporting the ETF Scorecard to help business areas monitor service level agreements, understand trends, and identify improvements to better serve customer needs. Dashboards present data on customer average wait times for critical transactions, including:
 - beneficiary designation
 - contacts with ETF (calls and email)
 - retirement estimates and applications
 - appointments
 - payment setup
 - death benefit estimates

There are also specific dashboards emphasizing possible leading indicators for appointment scheduling, which may help ETF better understand factors influencing our ability to meet our service level agreement for scheduling appointments.

- Completed review of contract proposals for vision, accident, and long-term care benefits. Recommendations were presented to and approved by the GIB.
- Developed, published, and communicated ETF's new customer vision statement for strategy and planning purposes. The vision statement is, "Our customers feel empowered and trust us to meet their needs through personalized, convenient and helpful interactions."
- Completed improvements to content for ETF's web page focusing on sick leave credit information for members and employers.

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

- In addition to the customer service operations dashboard, developed and implemented a budget dashboard to provide summarized and detailed information for budget, spending, and upcoming commitments and to create efficiencies supporting the monthly operating monitoring process.

- Successfully validated a contingency plan to ensure continuity of the weekly notifications process to health plans. Validation focused on readiness of cross-trained staff and efficacy of process documentation to support just-in-time-training.

TALENTED AND AGILE WORKFORCE (attracting, integrating and advancing top talent; advancing employee development through meaningful performance management approaches; implementing recruitment and retention practices to support equity and inclusion.)

- Developed dashboards to help ETF continue focusing on developing our talented and agile workforce by tracking the following:
 - employee retirement overview information
 - turnover review
 - ratio of reports to supervisor
 - carryover vacation
 - exit surveys

MODERN, SECURE AND RESILIENT INFORMATION TECHNOLOGIES (developing and deploying customer-focused solutions; integrating systems and processes for seamless, timely and secure stakeholder experiences). This includes ECM, IAS, data management, and information security.

- Improved access to ETF systems for staff, contractors, and third-party administrators, including:
 - new automation to support the annual user security analysis and validation report for all legacy system access
 - greater filtering ability for application access data
- Completed moving employer demographics and health insurance data to the ETF data warehouse for future analysis to help staff understand how it can better serve our members. Health insurance data will also be used for data conversion to the new Insurance Administration System (IAS).
- Added security controls to address the most critical system vulnerabilities as part of our vulnerability management program. Ongoing efforts to identify vulnerabilities and patch systems and software have reduced overall vulnerability risk to the lowest it has been since ETF implemented the program.
- Collaborated with an external IT vendor to test the security of ETF's user computers, with findings showing very strong security measures in place.
- Successfully responded to a critical vulnerability impacting IT systems across the world, demonstrating ETF's agility to respond to wide-ranging and forensic incidents.
- Implemented MyWisconsin ID (Okta) for creating and managing secure online accounts members will use when logging into the new ETF Web Forms application and future online ETF self-service tools such as IAS. We expect ETF members will

use the same MyWisconsin ID credentials when interacting with other state of Wisconsin agencies online in the coming months.

- The IAS project team engaged in five comprehensive testing cycles for the initial project phase, Phase 0, and successfully completed testing for the core system functionality. This gives assurance that the core system functions as expected, although we are not fully complete with this phase given outstanding effort to coordinate with third-party administrators (TPAs). All system critical defects were addressed, and only two non-critical defects remain. 513 test scripts were executed; some scenarios included:
 - State Medical Enrollments
 - State Supplemental Enrollments
 - QLE -State & Local Member Qualifying Life Events
 - Local Medical Enrollments
 - Local Supplemental Enrollments
 - Adding Dependents
 - Changes in Initial Enrollment
- Supporting the next phase of IAS, implemented MuleSoft as ETF's integration platform to facilitate data flow across current and future systems through development and management Application Programming Interface (API) capability. This new platform efficiently and securely sends data to and from our internal and external systems, including TPA systems, employers and vendors.

OTHER NOTEWORTHY ACCOMPLISHMENTS: this includes Administration, Compliance, and Policies.

- Wisconsin Deferred Compensation (WDC) Program
 - Completed contract negotiations for administrative and recordkeeping services.
 - Completed the annual financial report for calendar year 2021, receiving an unqualified or "clean" opinion.
 - Completed review of the Administrator's compliance with their contract. This report was submitted to ETF and indicates the WDC Administrator is in compliance with the contract.
 - Provided to the Administrator the 2021 Wisconsin Retirement System (WRS) pension estimates for active, vested members participating in the WDC for use by participants looking to improve their "Lifetime Income Score" and financial readiness for retirement.

- Wisconsin Retirement System (WRS)
 - Closed calendar year 2021, which included reconciling employer accounts, calculating the WRS effective interest rate, and applying interest to member accounts.
 - Working with the ETF Board consulting actuary, prepared the 2021 valuation of retired lives (which determines the annuity adjustments for the Core and Variable Funds), prepared the 2021 valuation of active lives (which calculates the 2023 WRS contribution rates), and prepared the 2021 sick leave programs valuation (which calculates the 2023 sick leave program contribution rates).
 - Completed year end 2021 tax reporting for WRS annuitants.
 - Completed a mailing to approximately 13,000 WRS annuitants as part of a project to comply with new tax withholding rules. These annuitants currently have a fixed dollar amount for their federal tax withholding. The letter informs annuitants how to change their federal withholding and what their default withholding status will be if they do not select a different option.

- Disability Programs
 - Produced annual Income Continuation Insurance (ICI) actuarial valuations for 2021. GIB approved a 20% decrease in state ICI premiums and also approved a premium holiday for the local ICI plan for 2023.
 - Successfully completed annual file ingest for Long-Term Disability Insurance (LTDI) salary and benefit updates. Also completed the annual file ingest for the Duty Disability benefit offset updates.

- Achieved a ranking of 13th of 25 WI State Agencies that reached or exceeded a 5% general spending goal with certified diverse suppliers in State Fiscal Year 2021.