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EXECUTIVE COMMITTEE  
ACCOMPLISHMENTS REPORT  
June 2022 – August 2022

This quarterly report highlights the Department of Employee Trust Funds highest-value strategic and operational accomplishments — including daily business activities, process improvements, successes, and milestones — achieved from June 2022 through August 2022. 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

- Designed and launched the new [Insurance](#) section on the ETF website featuring separate sub-sections on the main navigation menu for dental, vision, life insurance, and accident plan programs. These new section links are now “evergreen” meaning they will not change from year to year, reducing the need for employers and ETF staff to update materials. The redesign allows website users to quickly navigate to their desired benefit and has received consistently popular feedback. Landing page views for most non-medical programs increased compared to the same time period in 2021 including:
  - 22% increase for vision
  - 53% increase for Well Wisconsin
  - 219% increase for dental
  - 519% for the accident plan.
- Created a new Accumulated Sick Leave page for state employers. This change replaces the single page where members and employers were directed when searching for sick leave program information. The new site outlines the employer responsibilities, provides answers to frequently asked questions, and directs employers to training videos.
- Implemented the first ETF Local Update for local employers with more than 300 employers in attendance. Local employers heard presentations on 2023 health and pharmacy changes, 2023 open enrollment dates and details, an overview of supplemental insurance, a Well Wisconsin Update, a review of local employer termination check lists created by ETF, and in-depth training regarding the life insurance program.

*Pamela L Henning*

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary  
Electronically Signed 9/7/22

Board	Mtg Date	Item #
EXC	9.21.22	4A

### Member

- Created a customer segmentation dashboard to help develop ETF's customer experience roadmap as part of strategic initiative 1.3.1.
- Released a new Wisconsin Deferred Compensation (WDC) website for participants that is secure and personalized. WDC participants who choose to use the new features on this site can safely see their whole financial picture including savings and budgeting.
- Created a new, user friendly Uniform Pharmacy Benefits Certificate of Coverage for 2023.
- Contributed to an effortless customer experience by proposing a new, more member-friendly approach to collecting gender change information from members. The change was approved by ETF leadership in June and will be implemented by the end of the year.
- Updated ETF's Benefit Payment System to allow direct ACH payments for death benefits payable to Trusts. Previously a paper check was the only method of delivery for these benefits when payable to established Trust accounts.
- Reduced average length of time to complete retiree health insurance processing from 34 days to 25 days and increased number of items completed per month from an average of 600 to more than 1000 items. This was accomplished due to increased staff and overtime.
- Transitioned approximately 13,000 annuitants' federal tax withholding from a fixed amount, which is no longer available. Staff accomplished this by fielding approximately 1,400 calls on the topic, processing more than 9,000 tax withholding documents, and converting the remaining accounts to a default tax withholding status via a programming change.

### Employers and Members

- Developed content for the Upcoming Health Plan Changes landing page that launched in late July 2022. The page features important information, resources, and frequently asked questions about the WEA Trust transition and changes to other health plans for the 2023 plan year. This page will serve as the main go-to about health plan changes for members, employers, and ETF staff during open enrollment. Additional information and resources will be added to the page in advance of open enrollment.
- Implemented 21 new forms and document types within ETF's Enterprise Content Management (ECM) system after go-live to optimize use by business areas in processing member and employer requests.

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

- Launched a Data Steward Center of Excellence that formalizes the data stewardship practice and ensures it will be supported in the future. It will play a key role in promoting sound practices in data quality, metadata management, data lifecycle management, data usage, data security and privacy.
- Continued collaboration between Data Management and business operations staff to optimize the North Star dashboard. Gathered additional user input and expanded access to more users based on business interest.
- Conducted a Continuity of Operations (COOP) exercise to validate a just-in-time training plan ensuring the continuity of the All-Plan Weekly Notice - a critical process providing important information to health plans - should ETF experience loss of key staff who perform that function.
- Consolidated all annuity calculations within a single operational area to align resources with processes, reduce duplication of effort, and address potential resource risks.

**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.)**

- Hired key infrastructure and development contractors to ensure resources are available for modernization and mandatory operational projects.
- Created a new Learning Channel for cross-functional IT teams to demonstrate new technologies in the development and operations areas that have been implemented, optimizing ETF's ability to leverage and improve IT efficiencies.
- Customized and hosted the UW Business Analysis Certificate Program for more than 35 state employees, including 16 ETF employees. This program was at a reduced cost to ETF saving our agency a significant amount of time and approximately \$140,000.
- Implemented ETF's new performance management system on June 1, which includes the new training system "Welcome Page" with more robust functionality for all ETF staff. The Performance Team conducted multiple workshops and provided job aids to assist staff with performance goals and with navigating the performance section of the new "Welcome Page."
- Completed ETF's first annual formal training budget process review designed to help ensure we are being strategic about building a talented and agile workforce that can

meet our modernization needs. This provides an overall agency approach for managing our budget and staff training while preparing ETF staff for the modernized future.

**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, Insurance Administration System (IAS), data management, and information security.**

- Took steps to improve ETF's position for renewing its cyber-insurance policy, including:
  - Upgraded traditional antivirus to endpoint detection and response to better secure ETF user computers.
  - Implemented Multi-Factor Authentication (MFA) for third-party administrators to ensure that authentication and access to ETF computer resources are much more secure.
  - Implemented Privilege Access Management to create tighter, more granular security for access to ETF computer resources.
- Completed a project to review and approve 15 new information security policies to significantly increase ETF's coverage, ensuring the mapping and management of security controls more comprehensively rise to industry standards.
- Achieved 100% remediation of high-severity vulnerabilities in the past quarter, showcasing the value of ETF's Information Security Vulnerability Management Program.
- Created a new collaboration environment allowing ETF to create individual sites for ETF business areas that will have increased functionality, be easier to use, and be mobile-friendly.
- Completed the Technical Program DevOps Implementation project. This project migrated application source code from a legacy-based system to a modern industry-leading system that automates deployments of new applications and reduces deployment time by 20%.
- Completed the Web Application Hosting Platform Strategy project. This project developed a recommendation to implement a modern web application hosting platform to create modern, secure, and sustainable applications for modernization initiatives. The recommendation was approved, and implementation of the new web application hosting platform has started.
- The ETF and Benefitfocus teams established a revised implementation plan and deployment timeline. The revisions were based on numerous lessons learned, many of which were centered on the complexity of current ETF processes and how to apply those existing processes to the new Benefitplace platform. The IAS project is targeting a single deployment effort at the end of the second quarter of 2024.

- Confirmed the standard, base configuration of IAS. Completed extensive testing activity with no critical errors outstanding.

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

Budget

- Reviewed and approved ETF's State Fiscal Year (SFY) 2023 Operating Budget, which totaled \$57.8 million and will continue to support ETF's core functions and ongoing modernization efforts.
- Successfully closed out ETF's administrative appropriations for SFY 2022 and set up SFY 2023 for new financial reporting.
- Received a performance report from WebMD for the Wellness and Disease Management program through the second quarter of 2022. The report highlighted a 7.9% reduction in the number of health risks reported by participating individuals since the start of the year and a 10.6% reduction in health risks for individuals who participated in health coaching.

Other

- After months of planning, consolidating, preparation and construction, successfully transitioned off the 7<sup>th</sup> floor and moved our Supply and Mail Services, Records, and IT groups, including all technologies, to the 8<sup>th</sup> and 9<sup>th</sup> floors. The 7<sup>th</sup> floor spaces formerly occupied by ETF have officially been turned over to the Department of Administration (DOA).
- Implemented and tested system changes that reduced the assumed rate from 7.0% to 6.8%, as recommended by Gabriel, Roeder, Smith & Company in the *WRS Three-Year Experience Study* and as approved by the ETF board. The change includes updates to option conversion and money purchase factors, and to multiple system-generated forms.