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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
December 2022 – February 2023

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 December 2022 through February 2023. 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

- Published a training on Health Plans and Medicare, explaining what to do when an employee or retiree gains Medicare.

- Hosted a virtual ETF Local Update for local employers with nearly 200 attendees. Topics included:
    - the annual retirement system reconciliation;
    - changes to the Income Continuation Insurance Program;
    - Wellness program updates; and
    - new training on Health Plans and Medicare for Retirees.
  Employers unable to attend received a link to a YouTube video of the meeting.

- Hosted a virtual ETF State Update, attended by more than 100 attendees from several state employers. Topics included:
    - changes to the Income Continuation Insurance Program;
    - Wellness program updates;
    - a review of the state employee termination checklist;
    - new training on Health Plans and Medicare for Retirees; and
    - an overview of ETF's Ombudperson Services and how they assist members.
  Employers unable to attend received a link to a YouTube video of the meeting.

Pamela L Henning

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary
Electronically Signed 03/06/23

Board	Mtg Date	Item #
EXC	3.22.23	4A

Member

- Completed the IYC 2023 Open Enrollment project on schedule by the end of January, despite numerous challenges and obstacles that occurred during the project cycle. This annual operational project involves preparing website, training, communications, internal systems, and other resources to support health benefits open enrollment by state and local employees and retirees.

- Completed the W-4P project to update ETF's systems for new federal tax withholding elections and updated state tax tables and implemented related member communications plans. Subsequent member feedback spurred further refinements to the tax information on ETF's annuity payment statements to improve readability and comprehension of document.

- Resumed Outreach staff travel with a return to employer sponsored member group sessions and in-person small group member appointments hosted at various locations around the state. Member registration began in early December and the first event was held January 10, 2023. The plan calls for an average of 10 group appointments per month; each session can accommodate 12 members and their guests.

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

- Migrated data from the old content management system to the data warehouse to use for historical data analysis. ETF can now compare data in the current content management system (ECM) with data in the old content management system, allowing the agency to maintain the ability to identify trends over time through historical data analysis, as well as business questions about specific data.

- Indexed 40 new forms into ECM to process various member and employer requests. Five of these forms will help offset the scanning and imaging of up to 70,000 documents annually and save approximately 1,166 in staff hours annually.

- Updated a key process in the Benefit Payments System to secure and improve accuracy of member account information and eliminate the potential for unintended member account changes.

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, implemented, and provided to staff the first training series to help improve data literacy and evolve to a data-driven culture, where ETF consistently understands, uses, and communicates data in context as it relates to ETF business goals. "'Season 1" consisted of five videos. "Season 2" was launched in February 2023. These videos are being developed as part of Strategic Initiative 3.2.4 – Increase data literacy through training to ensure ETF understands, uses, and communicates data in context as it relates to ETF business goals. The videos have been well received.

- Launched a marketing plan to promote the extensive Learning and Development virtual online course library. This online course library provides professional development and job-related training to all staff in support of Strategic Goal 3: To develop a talented and agile workforce at ETF.

- Updates were made to all ETF conference room audio and video technologies to ensure the latest enhanced functionality so that staff working in the office can have more effective meetings and enhanced collaboration with staff who are working remotely.

- Developed, published, and implemented annual staff trainings, covering privacy, fraud and continuity of operations.

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.

- Engaged with proof-of-concept exercises with potential vendors to implement an identity proofing service for use in ETF's future self-service tools.

- Implemented a new CertiDeath death matching service that provides verified death information for annuitants and named survivors. Delivery of verified information reduces staff research time and will reduce the risk of overpayments to deceased members.

- Information Security

    o Developed and published ETF's Information Security Acceptable Use Standard to help govern and advise how staff use technology securely.

- o Work was done to enable enhancements to ETF's computer systems – including multifactor authentication (MFA) and more enhanced and proactive antivirus protection that provides greater efficacy, correlation, investigation (at the device and the network) and incident response. The measures implemented reduced ETF's data privacy risk and allowed ETF to maintain Cyber Liability Insurance at a competitive price.

  - o Finalized a technical solution, workflow, and process for ensuring more secure dissemination of business reports.

  - o Implemented enhanced security controls following the issue of Governor Evers' Executive Order #184, banning questionable software from running on state-issued devices. Additional controls and enhancements will be implemented on an on-going basis.

- Insurance Administration System (IAS)

  - o Completed a project milestone to transmit the first version of a data file to the new IAS. The data file contains key information used for the University of Wisconsin testing. Nearly 200 test scripts were executed to confirm successful configuration of the system.

  - o Hosted an initial local employer forum with a system demonstration and overview of the IAS project milestones. The Local Employer group, the next group to onboard onto the new system, officially kicked off.

OTHER NOTEWORTHY ACCOMPLISHMENTS: this includes Insurance Benefit Program Administration, Required Financial Reporting, Compliance and Policies.

- Issued ETF's Annual Comprehensive Financial Report as of and for the year ended December 31, 2021. The annual report provides comprehensive information about the Wisconsin Retirement System and other benefit programs administered by ETF and includes an unmodified ("clean") audit opinion on the benefit program financial statements and related notes.

- Benefit Program Administration

  - o Disability Programs
    - Completed the annual salary and benefit adjustments for duty disability claims. Also completed annual supplemental contribution process for Long-Term Disability Income recipients.
    - Completed annual disability annuity medical recertifications. The process resulted in zero benefit suspensions for failure to respond.

- Group Health Insurance Program
  - Began a new specialty drug pilot program known as clear bagging. The new program was added through the University of Wisconsin Specialty Pharmacy for non-Medicare members with Quartz Health Insurance who are receiving care within the UW Health system. This new program allows for these non-oncology specialty drugs to be paid for through the pharmacy benefit rather than the medical benefit, therefore allowing for a lower price on the drug and any rebates available for the drug to be passed through to the group health insurance program.

  - Recognized the well-being accomplishments of state agencies and UW institutions with 50 people in attendance at the [Well Wisconsin Awards Ceremony](#)

  - ETF issued $100,882.05 in wellness grants to 13 state agencies, 11 UW institutions, and 11 local employers to support employers' ability to fund employee well-being initiatives.

  - Completed the first Well Wisconsin Centers for Disease Control-recognized Diabetes Prevention Program with a cohort from the Department of Corrections in December and began two new cohorts in January with the Department of Health Services and the Department of Public Instruction.

  - ETF staff attended the Health Benefits Conference and Expo held by the International Foundation of Employee Benefit Plans. Conference topics focused on workplace well-being enhancement, health disparities, social determinants of health, and chronic condition risk management strategies. ETF staff have been invited back for a keynote speaker role at next year's conference.