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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
March-May 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 March through May 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 new Sick Leave Conversion Program Manual to provide a single resource for Employers to better understand the program and improve service outcomes for members. This resource is receiving positive feedback from Employers.
- Successfully completed annual reconciliation for the Wisconsin Retirement System, with this year marking the highest number of employers self-balancing with no needed intervention by ETF. This is encouraging as we work throughout the year to equip employers to understand the WRS program and their duties as employers.

Member

- Implemented a new online conferencing and meeting solution to improve the member experience for Member Services online appointments.
- Updated the "Contact Us" page on ETF's website with a new Q&A section, addressing common themes received from email inquiries. This new content is intended to answer frequently asked questions before members contact ETF.

Pamela L Henning

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary
Electronically Signed 06/08/23

Board	Mtg Date	Item #
EXC	06.21.23	4A

- The Wisconsin Deferred Compensation Program provided personalized Retirement Readiness Reviews to over 500 members.
- In cooperation with ETF and the Social Security Administration, the Wisconsin Deferred Compensation Program offered two “Steppingstones” webinars to members. Of the 3,388 members registered, 74% (2,516) attended the webinars.
- The Group Insurance Board approved an Income Continuation Insurance program (ICI) change that will permit eligible employees aged 70 and older to enroll in the program. The update also modified the maximum benefit duration schedule for claimants aged 60 and older. This change was made to ensure compliance with the federal Age Discrimination in Employment Act and became effective May 1, 2023. The Board also approved an ICI premium rate reduction of 10% effective February 1, 2024.

Member and Employer

- Hosted 300 Local employers on April 13th and 130 State employers on April 18th for ETF Local Update and ETF State Update. Topics discussed include:
 - 2024 Income Continuation Insurance changes
 - 2024 Health Insurance proposed changes
 - Deferred Compensations update
 - An overview of how ETF’s Ombudsperson Services help members and employers
 - Updates on Well Wisconsin and mental health services
 - Discussion on open enrollment dates for 2025
 - Tutorial on the High Deductible Health Plan
- Successfully helped members through another high-volume contact period caused by mailing annual statements and May 1st annuity mailers, and a high volume of annuitant tax issues. The IRS’ required W4-P is proving a very difficult transition for members, leading to repeat calls and repeat submission of forms to achieve desired withholding. This has resulted in more than 15,000 calls just on the topic of taxes during the first half of this year, compared to a more typical average of 13,000. Staff also processed 14,700 tax withholding forms—nearly double the usual volume of member-initiated tax withholding changes.
- Since restarting outreach travel to offsite locations, increased the number of member meetings with ETF staff serving more than 400 members in small group retirement sessions.

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

- Released the second online training series for ETF staff covering statistics, to improve effectiveness of data use and increase data-driven decision making.
- Deployed customized dashboards for managers and supervisors on the status of their team's performance with email phishing tests and training, allowing managers and supervisors to be more proactive in managing staff security awareness in support of ETF's growing culture of risk awareness.
- Completed Continuity of Operations Plan (COOP) Assigned Staff training to ensure those with COOP responsibilities understand the plan content and their roles in supporting it.

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.)

- Cross-trained additional staff to image documents into ETF's ECM system, ensuring documents will be imaged to the system in a timely manner should key primary staff members be unavailable.
- Kicked off ETF's mid-year performance evaluation process in February of 2023 and reached 100% task completion in April of 2023. This was a new process for ETF and following a review of the current 2022-2023 performance management cycle and the feedback received from staff, the process has been streamlined to allow staff more time to focus on the goal setting, mid-year, and final evaluation processes. In the coming months, the mid-year evaluation results will be analyzed in more detail.

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.

- Insurance Administration System (IAS) Implementation Activities
 - UW - Delivered a key data conversion file to the IAS vendor for testing, a key milestone for the project. This has paved the way for ETF to ensure that member demographic, eligibility and enrollment data is migrated successfully to the new IAS system, while also allowing members to create and enroll new dependents in real time.
 - Local Employers - Completed user acceptance testing of enrollment and eligibility configuration with 13 local employers. These employers have provided consistent, positive feedback about the system, including ease of

- use of the user interface and plan configurations. Also published an IAS local employer webpage on the ETF website. This webpage provides pertinent information to local employers where they can access project information and see timely reminders on upcoming forums and deadlines.
- Retirees and Inactive Members (ETF as “Employer”) - Initiated the Retirees and Inactives Discovery phase of the IAS project. Topics being examined include eligibility, enrollment, and payroll integration for those customers with ETF-administered insurance coverage who are receiving an annuity or are not actively employed by a Wisconsin Retirement System employer. Also, the team is discussing Medicare processes and how Medicare will be incorporated into Benefitplace, the online customer-facing enrollment tool.
 - The Identity Proofing Project completed proof of concept testing, which examined a security tool to demonstrate that its application is feasible for ETF. Customers will go through the identity proofing process when they first access ETF’s future online tools, starting with IAS. Identity proofing ensures a customer is who they say they are and adds security to accounts accessed online.
- Information Security
 - Provided Cyber Security presentations to more than 130 staff attendees on a variety of security-related topics. This effort, which received very positive reviews from staff, helps keep security top of mind and reinforces ETF’s risk-aware culture.
 - Implemented the Acceptable Use Security Policy, which included the completion of the Acceptable Use Standard and mandatory staff training, to raise awareness and minimize security risks for the agency, members and staff. Upon completion of training, staff provided an agreement to comply with the policy.
 - Implemented a new tool to assess the effectiveness of ETF security defenses to proactively identify vulnerabilities and weaknesses in networks and systems. This assessment allows ETF to strengthen our security posture and mitigate potential threats. ETF’s baseline configurations and detection tools withstood the test and identified the threats.
 - Implemented a market-leading cyber incident response platform that significantly improves ETF’s cybersecurity posture by streamlining and enhancing incident response capabilities. Results show improved tracking and reporting, incident management, knowledge management and visibility.

- Upgraded a reporting database to increase security and add additional data analysis capabilities in support of efforts to create reports and perform analysis of data related to disabilities as well as Enterprise Content Management (ECM) imaging and case management metrics.
- Decommissioned three complex, custom developed applications that have been replaced by vendor supported enterprise applications. Replacing these applications allows to the agency to focus on the implementation of new modern vendor managed systems and not maintaining legacy custom developed systems.

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

- Collaborated across business units to investigate and resolve a vendor appeal.
- Released the Pension Administration System (PAS) Strategic Partner RFP.
- Successfully strategized and engaged the Governor's Office, Legislature and interest groups on the budget and several pieces of legislation.