



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
 A. John Voelker  
 SECRETARY

Wisconsin Department  
 of Employee Trust Funds  
 PO Box 7931  
 Madison WI 53707-7931  
 1-877-533-5020 (toll free)  
 Fax 608-267-4549  
 etf.wi.gov

**EXECUTIVE COMMITTEE**  
**ACCOMPLISHMENTS REPORT**  
**September–November 2023**

This quarterly report highlights the Department of Employee Trust Funds’ (ETF’s) highest-value strategic and operational accomplishments—including daily business activities, process improvements, successes, and milestones—achieved from September–November 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)**

Member

- ETF’s wait time for member calls significantly improved during the 2023 It’s Your Choice (IYC) Open Enrollment period, compared to the same period last year. This year’s speed of answer was 2:48 minutes vs. last year’s measure of 10:17. This highlights the significant impact of a departing health plan last year which resulted in high member call volume.
- The Well Wisconsin program saw the highest number of Group Health Insurance Program members earn the incentive, reaching 50,115 as of the October 31, 2023, weekly report. This met the program goal set in 2017 of 50,000 members earning the incentive.

Employer

- Initiated meetings with employers participating in the Milwaukee County and City of Milwaukee retirement systems to plan the onboarding of those employers into the Wisconsin Retirement System (WRS) through 2023 Wisconsin Act 12.
- Completed WRS full-day employer trainings with 357 employers in attendance. This is an increase of 73 employers compared to the 284 in 2022.
- Released a recorded Members MyETF Benefits System (MMEB) 101 Training for Local Employers and Retirees that participate in the State of Wisconsin Health Insurance Program in response to numerous inquiries from this audience during Open Enrollment.
- Provided the IYC kickoff to HR Administrators with 201 State attendees and 276 Local attendees.

Member and Employer

- Prepared an informational web page to answer member and employer questions about the 2023 Wisconsin Act 4, the Jailers Law, and provided additional

*Pamela L Henning*

Reviewed and approved by Pam Henning, Assistant Deputy Secretary  
 Electronically Signed 11/27/2023

Board	Mtg Date	Item #
EXC	12.13.23	5A

outreach presentations to key stakeholders such as the Wisconsin Counties Association and the Badger Sheriffs Association. ETF is working to modify information technology systems, forms, and procedures to be compliant with the law, effective January 1, 2024.

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

- Developed enhancements to employee recruitment dashboards to filter data by different steps in the process and show timelines by classification and business unit to identify future improvements.
- Created a dashboard to map members by address location and employer location to determine where to allocate resources for member outreach.

**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.)**

- ETF's Diversity, Equity, and Inclusion (DEI) Staff Network Group (SNG) conducted a book raffle and exchange, focused on improving systemic processes to be inclusive for all. Those participating in the book raffle came together for a group chat to discuss the books, their interconnections, and how they can impact individual journeys and the culture at ETF.

**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.**

- As part of our overall modernization program, collaborated with the State of Wisconsin Department of Administration (DOA) to implement a new modern Web Application Hosting Platform and deployed our first applications into the production environment.
- Upgraded ETF's call delivery system, including much needed redundancy and downtime prevention, and implemented two-way whisper functionality allowing supervisors to assist specialists while providing service to members during their calls.

**Insurance Administration System (IAS)**

- Completed the testing of payroll deductions and file transfers with the University of Wisconsin.
- Collected 84% (365 of 432) of the Local Employer population's health insurance rate information for inclusion in the system.
- Completed the configuration for all local employers in Benefitplace.

- Created or updated user accounts for 276 local employers to provide them access to IAS applications.
- Initiated testing for the configuration of enrollment and eligibility options for Retirees and Inactive members.
- Kicked off testing the configuration of enrollment and eligibility options defined in their respective discovery sessions in collaboration with DOA, Non-STAR employers, and UW Hospitals and Clinics. A new portal, which employers will use to access Benefitplace, was also tested as part of these efforts.
- Initiated planning efforts with key vendors to provide COBRA services and a billing solution through the Benefitplace application.
- In partnership with all our insurance vendors, ETF is regularly exchanging files with existing employer data we have received and performing use case scenarios, data sync testing, and validation on new additions and changes to member records. This ensures that the data we extract from Benefitplace and send to vendors can be loaded and validated accurately.

#### Information Security

- Completed the Service and Organization Controls (SOC2) risk assessment of health and benefit plan vendors servicing our members. This is a part of ongoing efforts to minimize risk exposure in vendor service delivery.
- Implemented several security improvements to service delivery architecture to protect ETF staff and ETF data. These changes reduce ETF's cyber risk by providing greater visibility, threat protection, data loss prevention, and specific control measures of network traffic.

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

- Presented proposed program affordability and sustainability initiatives to implement over the next three years to the Group Insurance Board.
- Developed plan and started executing tasks to implement Income Continuation Insurance program changes, effective February 2024. Changes include consolidating the standard and supplemental coverage levels into a single coverage level.
- Reduced the backlog of estimates to final annuity calculations by 31%. The backlog, which increased to record levels due to a combination of staff vacancies and an increase in retirement applications, was reduced from 7,975 annuitants at the beginning of September 2023, to 5,750 as of mid-November 2023. The backlog is now at the same level as it was for the same period in 2022.

#### Wisconsin Deferred Compensation (WDC)

- The Deferred Compensation Board approved updates to the Wisconsin Deferred Compensation (WDC) Plan and Trust document that align the WDC with certain provisions of SECURE 2.0, a series of federal pension bill reforms passed in 2022 to improve retirement savings and simplify plan administration.

- The WDC hosted 80 webinars during the IYC Open Enrollment period, with 525 (56%) of the 938 members who registered in attendance.

#### Financial Reporting

- Issued financial reports for the WRS, Retiree Life Insurance, and Supplemental Health Insurance Conversion Credit programs as of, and for the year ended, December 31, 2022. The reports include the program's financial statements, related notes, and unqualified ("clean") audit opinions.
- Issued Employer Schedules for the WRS, Retiree Life Insurance, and Supplemental Health Insurance Conversion Credit programs as of and for the year ended December 31, 2022. These schedules are provided to employers to assist them in meeting their financial reporting requirements in accordance with Governmental Accounting Standards Board principles.

Staff will be at the Committee meeting to answer any questions.