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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
December 2023 – February 2024

This quarterly report highlights the Department of Employee Trust Funds (ETF) highest-value strategic and operational accomplishments — including daily business activities, process improvements, successes, and milestones — achieved from December 2023 through February 2024. 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

- Completed the Its Your Choice (IYC) 2024 Open Enrollment project, an annual operational project to prepare ETF’s systems and staff to support health benefits open enrollment by State and Local Employers. The annual IYC period spans from late September into October.

Member

- Launched a new section on the ETF website and an educational video providing information on the 2023 Wisconsin Act 4 for Jailers, effective January 1, 2024. The site describes who is impacted, what to do, decision deadlines, frequently asked questions, and more. Members are encouraged to use the WRS Retirement Benefits Calculator.
- Processed over \$10M in WRS additional contributions for over 1,000 members.

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 the following new dashboards to enhance ETF services:
 - “Appointment Heat Map” dashboard to identify the most popular scheduling times, which are booking up quickly, so that different options can be explored to better serve our customers.
 - “Retirement Application Trend” dashboard to see time average and median time between member retirement estimates and applications so that we can predict spikes in applications and perform appropriate workload planning.

Pamela L Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
 Electronically Signed 03/07/2024

Board	Mtg Date	Item #
EXC	03.27.24	6A

- “Lump-Sum Payment” dashboard to see monthly payroll vs. lump-sum payments to view detailed information on payments distributed and associated benefit types.
- “Transferred Calls” dashboards to view the calls transferred within the call center system broken down by day/time, agent, caller, and business unit.
- Conducted a gap analysis as part of a continuous improvement process initiative to identify opportunities for member-centric solutions.

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.)

- Initiated a new membership with University of Wisconsin E-Business Consortium (UWEBC), a collaborative learning community of leading companies focused on thought leadership, business best practices, and emerging technologies. UWEBC offers a library of video content and hosts more than 50 events annually that are available to all ETF staff.

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.

- Upgraded the call delivery software in the Member Call Center, enhancing the system’s ability to respond to outages while minimizing impacts to customers.
- Upgraded the ETF website content management system and implemented additional changes to website maintenance, archiving processes and schedules to improve search capability and the overall customer experience.
- Completed disaster recovery infrastructure testing with the Department of Administration Division of Enterprise Technology to ensure our new Database platform is ready for new transactional applications for the Insurance Administration System (IAS).
- Implemented Phase 1 of the Jailer’s law to ETF’s new web hosting platform, which also included updates and migration of the following applications:
 - Accumulated Sick Leave
 - Wisconsin Retirement System Account Update
 - Benefit Payment System and Lump Sum Payment System
 - Annuity Rates
 - Annual Reports
 - Retirement Estimate Request

- Completed the initial infrastructure buildout of a new observability and monitoring tool. Once fully implemented, this tool will enable the technical teams to monitor ETF systems and address issues prior to impacting customers while decreasing the time to diagnose issues.

Security and Risk Management

- Launched the development of secure and easy gateways to access My Insurance Benefits in Benefitplace and other applications by way of portals on the ETF website. These portals will be secured with multi-factor authentication and identity proofing processes to ensure the users accessing the applications have been verified and their connections are secure.
- Completed the migration to a new enterprise account and password manager system to provide stronger controls over user and privileged system accounts. The new system will securely store account information, create strong passwords, enable multi-factor authentication, and provide auditability and logging of account usage.
- Secured cyber liability insurance for the 2024 calendar year, based on the analyses and recommendations of an internal workgroup.
- Implemented three internal policies outlining ETF's security posture and advancing the agency's risk-aware culture, including:
 - Access Control Policy and Standard
 - Privileged Utility Program Standard
 - Password Standard

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

Insurance Administration System

- Completed enrollment and eligibility configuration testing defined in the discovery sessions for Department of Administration, STAR, and Non-STAR agencies, as well as retirees.
- Successfully loaded data related to approximately 59,000 members from over 200 employers with associated insurance benefits to the new enrollment system.
- Introduced the branded name of IAS as My Insurance Benefits. The brand name meets the requirements of being simple, easy to use, easy to remember, and clearly tells users what they can expect. The name also complements the brand name of the future My Benefits portals for members and employers, which will provide secure access to My Insurance Benefits and other tools.

Financial Compliance

- Issued ETF's Annual Comprehensive Financial Report as of, and for the year ending, December 31, 2022. 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.

Other

- Completed the Well Wisconsin RFP project ahead of time due to no vendor change. The updated contract with WebMD went into effect January 1, 2024.

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