



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
June - August 2024

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 June – August 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

- Hosted an ETF State Update meeting, attended by 99 state employers to provide a Well Wisconsin update, a refresher on managing the benefits for retirees returning to work, and a presentation on ETF's customer experience efforts including developing employer personas.
- Hosted an ETF Local Update Meeting attended by 243 local employers to provide an update on the life insurance premium date move for local employers, a discussion to gather feedback from the employers regarding local health insurance program initiative, and a presentation on ETF's customer experience efforts including developing employer personas.

Member

- Developed the My Insurance Benefits Member Communication Plan, which is designed to transition members to the future state of interacting with their insurance benefits through the Insurance Administration System, referred to members as *My Insurance Benefits*. Member messaging is expected to begin in the first quarter of calendar year 2025.
- Redesigned the *Separation Benefit Application* form to make it available online and simpler to complete. About 14,000 *Separation Benefit Applications* forms are requested by members each year. Of those members who apply, about 13% make an error on the application that delays their benefit. Initial data already shows lower application rejection rates and improved processing turnaround times—which is good for both members and employees.

Pamela L Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
 Electronically Signed 09/05/2024

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

- Implemented an IT service management solution for the three largest Wisconsin Retirement System employers to manage their insurance-related issues, questions, and technical needs. The system offers knowledge documents on common issues, consolidates related communications, provides status updates and transparency on outstanding issues, and allows ETF to gather customer service metrics. This effort offers a streamlined support model to prepare employers for using *My Insurance Benefits* in 2025. The three largest employers were chosen to participate in this pilot due to the volume of issues related to their employees. If the effort is successful, the use of this IT service management tool will be expanded to additional employers.
- Implemented additional governance oversight in tandem with the recent resetting of the Insurance Administration System (IAS) Program. Several groups oversee the IAS Program implementation progress, including key ETF staff and leaders, to monitor progress, address escalated issues and risks, and make critical decisions.

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 leadership development for supervisors within several business units to address learning gaps and barriers in new hire training, establish consistent performance management updates, and strengthen leadership dynamics across the business.
- Completed the 2024 final performance evaluations with 99.97% completed on time.
- Began agency-specific training for employee performance goal setting in May and completed in July. Over 70 employees participated in unit-focused goal-setting training, and 52 employees attended organization-wide, goal-setting training sessions. This represents about half of all permanent employees eligible to participate in goal setting.
- 21 supervisors completed the “Evaluating Goals” live sessions.
- Rolled out the second of the five functional competencies for each job family. During this quarter, educated all permanent employees on job families generally, their specific job family, and the competencies related to their job family.

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.

- Implemented a new process enabling business units to back up critical documents needed to support Continuity of Operations (COOP), by automatically syncing selected documents to a single secured SharePoint site. This process ensures a secure and redundant solution for accessing critical documents should a system disruption occur.
- Updated ETF's vendor performance standards tracking and reporting process. The data incoming from vendors has been standardized, defined, and cleaned, and the quarterly report process has been automated to increase efficiency and reduce the possibility of errors.

Insurance Administration System

- Converted approximately 90% of retirees to the My Insurance Benefits application with a 95% conversion success rate.
- Ongoing progress supporting Local Employers includes:
 - Collected the initial employee conversion data from 708 of 930 of local employers.
 - Collected intake/configuration data from 902 of 930 local employers. Intake/configuration data is required to set up and configure the employer in *My Insurance Benefits*.
- Collected security access agreements from 915 of 930 local employers. A security access agreement is required to set up employer human resources administrative access to My Insurance Benefits, and for ETF to establish a secure file transfer protocol with employers so they can submit and validate conversion data.
- Started development for the new data quality framework for the data warehouse with the first version of the data quality dashboard completed.
- Identified all the required reports necessary for insurance-related business operations in scope for the Insurance Administration Program.
- Completed the following My Insurance Benefits testing:
 - Confirming the configurations of Department of Administration payroll roles and permissions, full file conversion, and daily file testing
 - Qualifying life events
 - External vendor integrations data sync
 - The initial round of testing for UWHC payroll.

- Testing is underway for the configurations that will interact with retiree and inactive insurance benefits.
- Significant progress was made toward enhancing the *My Insurance Benefits* platform's customizable text and defining messaging capabilities, including the review of all employer segments.

Information Security

- Identified targeted areas to improve compliance and the management of cyber risk as a component of ongoing HIPAA security risk assessments. These actionable items were presented to Strategic Council for review and will be cyclical as we seek to continuously improve our risk-aware culture.
- Improved and began operationalizing third-party risk management into the risk management framework. This improves ETF's reporting of cyber risks and allows the business to make better informed, risk-based decisions when engaging vendors for service delivery.
- Continued implementing the new Security Operation Center Platform, including adding data sources that significantly improve visibility into events occurring within our computing infrastructure. This also improves the ability to determine causality of cyber security anomalies as they occur, improving ETF's response capabilities.

Enterprise Content Management

- Completed a major upgrade of ETF's document management platform. This upgrade ensures a secure and supportable platform as we move forward with IAS and enables additional functionality for the business.

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

- Completed annual income certifications for over 3,000 Disability Retirement Annuity and Long-Term Disability Insurance (LTDI) program recipients, resulting in seven disability annuity and 11 LTDI benefit suspensions for failure to comply with ETF requests for information.

Group Health Insurance Program

- Significant progress has been made on three Request for Proposals (RFP), including:
 - Medicare Advantage and Medicare Plus (Medigap) health insurance bids for state and participating local retirees were received on July 11, 2024. Staff has reviewed assumptions and exceptions, and the evaluation team has been scoring the bids. Proposers may be asked to present to the evaluation team in September or October. Currently these programs insure 20,501 members out of a total population in the Group Health Insurance Program of 239,729.

- Received proposals for the third-party administration of the Pharmacy Benefits Program, due by August 1, 2024. The Pharmacy Benefits Program touches the entire population of the Group Health Insurance program, and the new contract will begin January 1, 2026.
- Received and began evaluating proposals for pre-tax benefits for state employees in the Group Health Insurance Program, due August 1, 2024. Currently, there are approximately 95,000 eligible participants.
- ETF wrote and published a Request for Information (RFI) to gather market information of value to the Access and State Maintenance Plan (SMP), and the Local Group Health Insurance Program. Four responses were received from Health Plans by the end of July 2024, and are currently being reviewed by ETF staff.

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