



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
December 2024 - February 2025

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 2024 to February 2025. 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

- Successfully onboarded 40 employers to the Wisconsin Retirement System (WRS) that were either entirely new to the WRS or electing to cover additional employee groups.
- Published an Annual Reconciliation interactive e-learning module, providing employers a readily available and engaging option to assist them with the year-end reconciliation process.

Member

- Added several customer service improvements in forms and letters regarding disability program annual mailings and certifications for quicker and more direct communication.
- Streamlined Social Security earning offsets reviews, which includes:
 - Mailing tax documents requests to better align when members receive their tax documents and file their taxes.
 - Eliminating the request for the Social Security new benefit letter to expedite the process for members and ETF staff.
 - Eliminating the review of the current year Social Security offset if the difference is below a defined threshold, thereby removing extra steps from the process.
- Moved the Disability Retirement Estimate Request web form to the secure My Benefits portal, which will launch in March, to streamline and improve how members access this form and other self-service.

Pamela L Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Electronically Signed 03/11/2025

Board	Mtg Date	Item #
EXC	03.26.25	4A

- Updated the forfeited service worksheet used to generate cost estimates for members, as changes would increase efficiency and decrease likelihood of errors through added controls.

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 the first phase of a new business continuity system, in compliance with the Department of Administration (DOA), including the transfer of ETF's Business Continuity Plan content from the retired system to the new one and its preparation for additional development to provide more robust reporting through features that enhance collaboration among business continuity leaders during a disruption to ETF operations.
- Developed the following new business continuity tools and training:
 - MS Teams Channels for Business Continuity Recovery Teams to improve communication and collaboration during a business disrupting event
 - Status Report application as a means of tracking the recovery status of individual essential business functions following a business disrupting event.
 - Incident Briefing Status Report, which uses information from the Status Report application to provide comprehensive views of ETF's recovery status.
 - Continuity of Operations Training e-learning module, which introduces business continuity staff to and provides them with instruction on the MS Teams Channels, Status Report application, and Incident Briefing Status Report.

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)

- Surveyed senior leaders across the agency on leadership development needs, priorities, and optimal formats to consider for inclusion within the ETF Leadership Development program, which is currently under development.
- Guided employees and supervisors through the annual midyear performance evaluation process, utilizing a streamlined process to better define role expectations.
- Implemented a new call scoring sheet to obtain customer feedback for Call Center staff, as feedback is crucial to specialists for improving customer interactions with members and providing positive customer experiences.

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, PAS, data management, and information security)

- Initiated the use of an issue management system for locals and non-STAR state agencies, to ensure timely reporting and response of issues, as this process is already being utilized by the DOA, University of Wisconsin (UW) Hospitals and Clinics, and the UW System.

Insurance Administration System (IAS)

- Developed the IAS Training Program curriculum and set the IAS Program Training Calendar for live, virtual training sessions for ETF staff and employers who will frequently work in the new IAS systems.
- Trained key business units on the new My Benefits login process, to support members who will use online self-service tools.
- Completed 87% of local employers for initial conversion files and will begin using the Employer Transaction Application User Interface for second round of validations.
- Successfully completed the Demographic and Eligibility load for February Conversion Testing, achieving high load success rates across the sponsors.

Pension Administration System (PAS)

- Completed vendor demonstrations for the PAS search and selection effort.

OTHER NOTEWORTHY ACCOMPLISHMENTS (this includes Insurance Program, Administration, Compliance, and Policies)

- Issued ETF's Annual Comprehensive Financial Report as of and for the year ended December 31, 2023, which provides comprehensive information about the WRS and other ETF-administered benefit programs and includes an unmodified ("clean") audit opinion on the benefit program financial statements and related notes.
- Completed a successful WRS Annual Reconciliation of 2024 with no major issues, which ensures that the Annual Statement of Benefits should go out timely in April.
- Completed the final phase of systems changes supporting implementation of the Jailer Law.

Vendors/Third Party Administrators

- Successfully concluded the requests-for-proposals process for pharmacy benefit programs, Medicare Advantage, and Medicare Plus, and issued letters of intent to Navitus Health Solutions and United Healthcare.