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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
March 2025 - May 2025

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 March to May 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

- Developed and presented My Insurance Benefits training for the Universities of Wisconsin (UWs) achieving a 90% satisfaction from the employer learners.
- To enable better issue and ticket management with employers, approximately 3,000 additional employers have been added to the IT Service Management system (ITSM). This automates ticket creation and assignment, provides greater transparency and communication with employer contacts, and enhances reporting capabilities to support customer service improvements.

Member

- Implemented My Annual Statement of Benefits, a new online tool used by more than 17,000 members to download their Wisconsin Retirement System (WRS) Annual Statement of Benefits dating back to 2012. In conjunction with this release, the My Benefits for Members portal was released. Members will use My Benefits to access this and future online, self-service tools.
- Mailed 399,293 WRS 2025 Statement of Benefits to the home addresses of active and inactive employees and alternate payees. Employees of the UWs access their statements through the UWs' secure employee portal. The ETF website provides convenient resources to help members understand statements.
- Launched the My Benefits landing page on the ETF website, which provides easy access to the secure My Benefits for Members portal. Helpful resources are also available, such as the "Get Started with My Benefits" video and information on how to set up a MyWisconsin ID and multi-factor authentication.

Pamela L. Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Electronically Signed 06/02/2025

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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)

- Improved the process for managing agency records and approving Retention Disposition Authorizations, so that document reviews and approvals are only conducted with the impacted business area(s). This improvement includes the STAR Finance disposition process.

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.)

- Launched the “My Insurance Benefits Member Experience” video to all staff. The video highlights Navigation, New Hire Enrollment, Dependent Verification, and Qualifying Life Event Change processes in the system.
- Developed training materials for 12 live, virtual My Insurance Benefits training courses and delivered piloted training sessions. Achieved 4.5/5-star ratings on courses completed.
- Implemented the “Remote Worker Agreement” module created by the Department of Administration to document, track electronically, and report on remote work agreements. Completed annual submissions for all applicable ETF employees.

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 the Enterprise Content Management system (ECM), Insurance Administration System (IAS), Pension Administration System (PAS), data management, and information security.

- Completed the migration of all custom-developed applications to a new, modern web hosting platform. This migration included increasing the security of the applications and adding flexibility to our application configurations that enable a smoother and more efficient functionality for future application updates. This migration also addressed the retiring of six applications no longer required and the decommissioning of the old web hosting platform which resulted in a monthly cost savings for the agency.
- Streamlined the process for Domestic Partner case management through the migration of the legacy application to the ECM. This migration included the decommissioning of the Domestic Partner application.

IAS

- Launched the Employer Transaction Application, My Benefits Employer Portal, and changes to the Master Data Management. These applications are now in use preparing data for the My Insurance Benefits launch with the UWs on July 1, 2025.
- The IAS Program now includes an Annual Renewal Project which will examine the implications My Insurance Benefits will have on open enrollment-related processes.
- Updated priorities and realigned project plans to prepare for the adjusted stakeholders in the My Insurance Benefits launch on July 1, 2025. This included building processes for vendor file exchanges, which eliminated a need to implement an electronic enrollment freeze period for the UWs launch.
- Developed and tested a data conversion process that achieved a 99% success rate on the conversion of employer and vendor demographic, eligibility, and enrollment data into My Insurance Benefits.
- Successfully completed a mock conversion of the UWs data into My Insurance Benefits. This activity confirmed that the steps to convert data are accurately in place for the July 1, 2025, UWs launch.

PAS

- Participated in several vendor demonstrations for pension administration systems and issued notices of intent to award a contract to two vendors. The proof of concepts will occur later this year to determine which vendor best meets ETF needs.

OTHER NOTEWORTHY ACCOMPLISHMENTS. This includes the Insurance Program, Administration, Compliance, and Policies.

- Completed an initial accessibility audit of the ETF website in preparation for a new federal rule on ADA accessibility and WCAG 2.1 Level AA technical requirements, which takes effect April 24, 2026. The rule applies to all government public-facing websites, including downloadable PDF files, videos, and web applications (e.g., online calculators, secure email, web forms).
- Conducted a Risk Management Practices Survey of managers as part of Strategic Initiative 3.1.10, which focuses on planning for a new Office of Enterprise Risk Management. The survey is designed to ensure ETF's future approach to enterprise risk management aligns with the needs and perspectives of business areas. It gathered insights on current risk management practices, the

categories of risks encountered, and managers' views on risk management priorities and challenges.