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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
June-August 2025

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 June through August 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

- Launched the My Insurance Benefits eligibility and enrollment functionality with the Universities of Wisconsin (UWs) on July 1, 2025, creating 24-hour/seven days per week access for active members of the UWs
- Continued developing depth of knowledge for key staff on My Insurance Benefits to ensure a high level of customer service is provided to the UWs
- Provided education to approximately 20 new employers inquiring about joining the Wisconsin Retirement System (WRS)
- Started 12 full-day WRS Employer Training sessions with 149 attendees as of August 22, 2025, and 49 additional attendees scheduled for week of August 25, 2025
- Provided more than 140 pages of Insurance Administration System (IAS) procedures for Employers
- Scheduled Open Enrollment training sessions for employers, including locals, state, and a separate session for the UWs

Member

- A total of 4,045 unique users (9,320 total sessions) have logged into My Insurance Benefits since July 1, which equates to roughly 8.9% percent of UWs 46,538 subscribers. This number is expected to rise significantly during Open Enrollment because it will be the first time most members will access the system.
- ETF completed 1,008 annual income reviews for duty disability recipients. This involves review of income tax forms to apply income limits and Social Security

Pamela L Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Electronically Signed 09/17/2025

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benefits, which offset the duty disability benefit. This resulted in about 132 benefit payment adjustments.

- ETF successfully completed a rewrite and redesign of the Retirement Benefit Estimates and Application form. These changes are intended to reduce the rejection rate of member applications by making the form more user-friendly and minimizing common errors. Key improvements include:
 - Plain language revisions throughout the form to enhance readability and accessibility
 - Numbered section headers for easier navigation and reference
 - An updated tax section aligning with other ETF forms for consistency and clarity
 - Removal of backside instructions from the application form to simplify the document and reduce confusion, and creation of a new stand-alone guidance document to accompany each application
- Improved our internal processes for locating and reconnecting with lost contacts, with the primary goals of reducing the overall number of lost contacts and increasing the resources dedicated to locating them:
 - Streamlined internal workflows to clarify responsibilities, eliminate redundancies, and improve coordination across teams
 - Implemented an improved tracking tool to document outreach attempts, monitor status, and flag accounts requiring additional attention)
 - Increased staff time and effort allocated to lost contact recovery
- Improved the retirement, death, and disability forms, as well as the associated workflows that support the processing of these forms:
 - Replacing the Social Security number with the Member ID for enhanced security
 - Implementing additional automation to workflows, reducing the number of returned/rejected forms due to incorrect information being provided by the member

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

- Following the launch of the My Benefits Member Portal featuring the annual Statement of Benefits (SOB), ETF saw a reduction in duplicate SOBs mailed from 1,590 in 2024 to 220 in 2025 over a four-month period (April-July). This calculated to a savings of 435 staff hours (equivalent to .9 FTE), which can now be dedicated to more value-added work, and \$812.41 savings in printing, supplies, and postage.

- There have been more than 21,000 new MyWisconsin ID users since My Statement of Benefits went live. Users are signing up now at a rate of approximately 500 new users per week.
- ETF implemented a new system to set and monitor productivity goals, and to provide better performance metrics. The result is to make best use of resources and to be more agile in shifting resources to the most critical tasks.
- In addition to auditing annuity calculations within the work unit, ETF incorporated a new process in the Office of Internal Audit (OIA) to independently audit all annuity calculations each quarter. The previous OIA process involved reviewing a sampling of calculations on an annual basis. After two OIA annuity calculations reviews this quarter, the results showed no errors and 100% accuracy.
- ETF updated the *Continued Life Insurance Worksheet* to better explain whether a member's coverage continues at retirement. This process improvement helps the member and saves staff time on internal processing.

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)

- Completed all required annual performance evaluations according to the department's yearly performance cycle
- Completed a pilot Team Effectiveness Training for Leaders (*Five Behaviors of a Cohesive Team*) for Division of Benefit Administration senior leaders, with a Team Effectiveness training cascaded to the next level of management in this business area
- Scheduled the upcoming ETF IGNITE Leadership Development Program, a 14-month hybrid cohort, in October to empower supervisors with the mindset, skills, and vision to serve others and lead with lasting impact while aligning with ETF's Strategic Goal to build a talented and agile workforce
- Built and launched micro-learning on Data Literacy, Learning Agility, Collaboration, and Adaptability to support the IAS digital dexterity skills strategic initiative

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, IAS, Pension Administration System (PAS), data management, and information security.

- Achieved 100% completion for the 2025 Security Awareness Training for all ETF staff
- Successfully validated the effectiveness of high-severity security controls required by the Department of Administration

IAS

- MyWisconsin ID began offering a voice multifactor authentication option to users. Those who choose this option will receive a voice phone call message offering a code to use for authentication when logging in. This is a great option for people who do not have a smartphone and for individuals who are visually impaired.
- ETF implemented a data conversion process for UWs in production that migrated demographic, eligibility, and enrollment data into My Insurance Benefits.
- ETF implemented daily transactions for UWs in production to transfer demographic and eligibility data into My Insurance Benefits supporting insurance transactions.
- ETF implemented the first of several releases of the MyETF Benefits (MEBS) Bridge, which automates the process of getting health enrollments from Benefitplace into MEBS, so those enrollments can be sent to vendors and billed appropriately.

PAS

- The Joint Committee on Finance approved funding for PAS.
- ETF started preparations for the upcoming Proof of Concept (PoC) which is scheduled to occur September 29 – November 21. The PoC will involve one use case and eight tabletop discussions and is designed to further assist ETF with deciding between two vendors. Final vendor selection will occur between November 2025 and March 2026.
- Negotiations regarding department terms and conditions with both vendors are nearing completion.

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

- ETF successfully negotiated new contracts for the pharmacy benefit manager, pre-tax savings account third-party administrator, accident insurance third-party administrator, and vision benefit manager for the 2026 plan year. All these ensure continued high-quality service delivery, competitive pricing, and strong performance guarantees to support members' benefit needs.