



STATE OF WISCONSIN
Department of Employee Trust Funds
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Correspondence Memorandum

Date: October 17, 2019
To: Group Insurance Board
From: Xiong Vang, HSA & ERA Accounts Program Manager
 Office of Strategic Health Policy
Subject: ConnectYourCare Implementation Update

This memo is for informational purposes only. No Board action is required.

Background

ConnectYourCare (CYC) is the third-party administrator of the Health Savings Accounts (HSA), Employee Reimbursement Accounts (ERA) and Commuter Fringe Benefit Accounts for the 2020 Plan Year. The Department of Employee Trust Funds (ETF) and CYC continue to meet weekly to ensure deliverables are met to ensure a smooth transition and successful implementation.

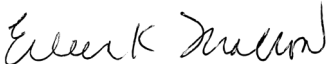
ETF evaluated the deliverables CYC completed during implementation, which is provided in Attachment A. A State of Wisconsin Implementation Summary Report is provided in Attachment B.

Milestones Past Due

The late milestones that are past due in Attachment B reflect the final production files interface to be received from the payroll centers and signoff in phase two testing. Originally, the files were expected to be completed by the end of August as an aggressive timeline in preparation for 2020 Open Enrollment ([Ref. GIB | 8.21.19 | 8B](#)).

Five out of the nine payroll centers have signed off with the completion of their production files, and the other four remaining payroll centers are above 90% completion in their phase 2 testing. The production files will be completed prior to the November Board meeting.

CYC expressed no concerns with the milestones that are currently past due with an understanding of the aggressive timeline approach. Time and other higher prioritized deliverables from the payroll centers were factors to not having the files completed by the end of August.

Reviewed and approved by Eileen K Mallow, Director, Office of Strategic Health Policy  Electronically Signed 10/25/19
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Board	Mtg Date	Item #
GIB	11.13.19	10C

Updates

To date, CYC has completed 80% of the implementation tasks since the contracts were signed on May 7. During the 2020 open enrollment period, CYC attended more than 40 benefits fairs across the state. There have been no major obstacles during implementation and ETF expects all deliverables to meet their due dates.

Communication will be a continuous process with emphasis on educating and training employers' payroll and benefits staff in the coming months, and into the 2020 plan year. In addition, targeted communications for those who have completed an HSA Transfer of Assets will be released in early December 2019 for confirmation of the transfer.

Staff will be at the Board meeting to answer questions.

Attachment A: Implementation Requirements Timeline

Attachment B: State of Wisconsin Implementation Summary Report

Attachment A: Implementation Requirements Timeline

Activity	Due Dates	Status
Implementation Plan: The Contractor submits an updated implementation plan in a mutually agreed upon format and timeline to the Department Program Manager or designee.	Within ten (10) business days of execution of the Contract	Completed
Fraud and Abuse Review Plan: The Contractor submits a fraud and abuse review plan to the Department.	Within thirty (30) calendar days of execution of the Contract	Completed
Non-Discrimination Testing Plan: The Contractor works with the Department to establish deliverables and a timeline for annual non-discrimination testing for the benefit program. The Department will establish the first-year due date in accordance with this plan.	Within thirty (30) calendar days of execution of the Contract; and on an annual basis	Completed
Transition Plan: The transition plan is established in a mutually agreed upon format and submitted to the Department Program Manager or designee for review.	Within thirty (30) calendar days of execution of the Contract; and within thirty (30) days following contract termination	Completed
Program Information: All benefit program informational materials for the new Plan Year is submitted to the Department Program Manager or designee for review and approval.	August 1 (on an annual basis)	Completed
Web Content: The Contractor must provide the Department Program Manager or designee the customized web pages dedicated to the benefit program and for the upcoming It's Your Choice Open Enrollment period for review and approval.	August 1 (on an annual basis)	Completed
Customer Service: The Contractor's dedicated toll-free customer service telephone number is operational and customer service staff for the benefit program are trained.	September 15, 2019	Completed
Web Content Launch: The web content dedicated to the benefit program and upcoming It's Your Choice Open Enrollment period is completed, as determined by the Department Program Manager or designee, and launched.	September 15 (on an annual basis)	Completed

Attachment A: Implementation Requirements Timeline

Activity	Due Dates	Status
<p>Microsite Content Launch: Contractor’s microsite, customized for the Department, is fully functional. The Department specific materials, educational videos, contribution calculators, log-in to the secure portal and related benefit program materials, updated for each plan year, shall be included on the microsite.</p>	September 15 (on an annual basis)	Completed
<p>Employer Kick-Off Meeting: The Contractor shall attend the IYC Employer Kick-Off meeting and provide guidance and Benefit materials to payroll center staff.</p>	September 17 (on an annual basis)	Completed
<p>Informational Mailing: The Contractor shall send an informational mailing with materials approved by the Department Program Manager or designee to eligible Benefit Program households one (1) week prior to the start of the It’s Your Choice Open Enrollment period.</p>	September 15 (on an annual basis)	Completed
<p>Employer Health Fairs: The Contractor shall participate in IYC Open Enrollment health fairs sponsored by Employers.</p>	September 30 – October 25, 2019; and on an annual basis	Completed
<p>Eligibility File: An audit of the payroll center and Department eligibility files have been fully tested and are ready for Benefit Program operation.</p>	November 15	Expected To Be Completed
<p>Enrollment File: The enrollment verification audit of the Payroll Center and Department enrollment files have been fully tested and are ready for benefit program operation.</p>	November 15	Expected To Be Completed
<p>Financial Administration: Financial administration requirements are operational, including but not limited to:</p> <ul style="list-style-type: none"> • Establishment of bank account(s) for funds for claims payments, and determination of bank account(s) ownership. • Establishment of mutually agreed upon written procedures related to managing the bank account(s) and invoicing (including data fields to be included). • ACH mechanism for electronic funds transfer/EFT of claims payments and fees. 	November 30	Completed
<p>Grievance Procedure: The Contractor submits its internal grievance procedure to reflect</p>	November 30	Completed

Attachment A: Implementation Requirements Timeline

Activity	Due Dates	Status
implementation of the Department's grievance procedure, including the Department administrative and independent review rights and sample grievance decision letters, for the Department's review and approval.		
Debit Cards: The Contractor issues debit cards for participants with coverage effective January 1 of each plan year.	December 15 (on an annual basis)	Expected To Be Completed
Welcome Packet: The Contractor issues welcome packets for Participants with coverage effective January 1.	December 15 (on an annual basis)	Completed
Claims Administrative Services: All claims administrative services for the benefit program are fully operational.	January 1	Expected To Be Completed
Administrator Web-Portal: The Contractor's web-portal for Department and payroll center Administrators is launched.	January 1	In Progress
Participant Web-Portal: The CONTRACTOR'S web-portal for PARTICIPANT account management is launched.	January 1	In Progress
Participant Mobile Application: The CONTRACTOR'S mobile application for PARTICIPANT account management is launched.	January 1	Completed
Administrative Fee Invoicing: The CONTRACTOR'S administrative fee invoicing to the Department is established, tested and working correctly.	January 31	Expected To Be Completed

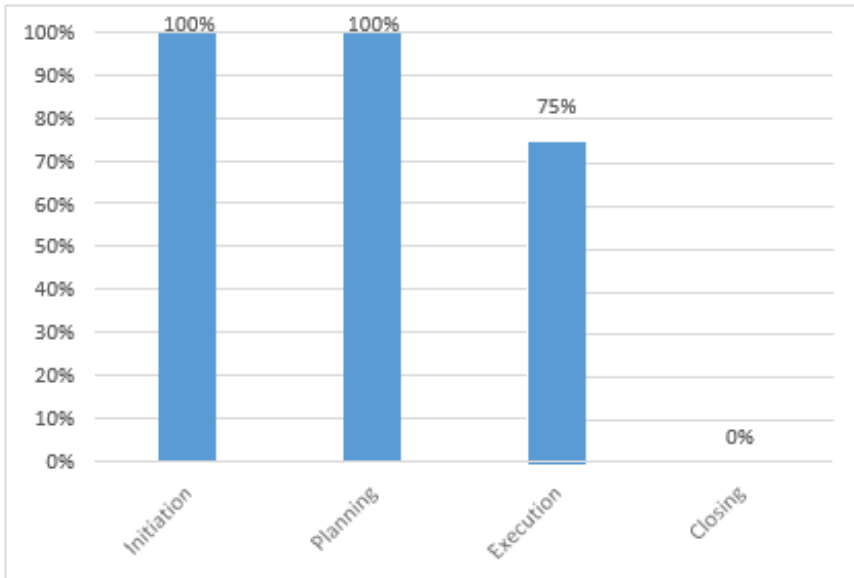
Attachment B

State of Wisconsin Implementation Summary Report

WED 5/1/19- THU 4/30/20



% COMPLETE
Status for each major phase of the Implementation



MILESTONE REPORT

Name	Finish	Days Left	Color
Conduct Implementation Kickoff Meeting (ETF & CYC)	Thu 5/9/19	-167	Blue
Conduct Transition Kickoff Meeting (ETF, CYC & TASC)	Fri 5/10/19	-166	Blue
Customer Service Lines Open	Sun 9/15/19	-38	Blue
Verify Card Generation & Mailing	Mon 12/30/19	68	Green
Go-Live: Plan Year Start Date	Wed 1/1/20	70	Green
Configure Employer In Production	Fri 8/23/19	-61	Blue
Employer Files Production Signoff - Central	Mon 9/9/19	-44	Green
Employer Files Production Signoff - Courts	Mon 9/9/19	-44	Green
Employer Files Production Signoff - Legislature	Mon 9/9/19	-44	Green
Employer Files Production Signoff - Fox Valley Navigation Systems	Mon 9/9/19	-44	Green
Employer Files Production Signoff - UW System	Fri 11/8/19	16	Green
Employer Files Production Signoff - UW Hospitals & Clinics	Mon 9/9/19	-44	Green
Employer Files Production Signoff - WEDC	Mon 9/9/19	-44	Green
Employer Files Production Signoff - WHEDA	Mon 9/9/19	-44	Green
Employer Files Production Signoff - Wiscraft - Beyond Vision	Mon 9/9/19	-44	Blue
Employer Sign-Off (Lessons Learned, Satisfaction)	Thu 2/27/20	127	Green

Attachment B

LATE MILESTONES	
Milestones that are past due.	
Name	Finish
Employer Files Production Signoff – Central	Mon 9/9/19
Employer Files Production Signoff - Courts	Mon 9/9/19
Employer Files Production Signoff – Fox Valley Navigation Systems	Mon 9/9/19
Employer Files Production Signoff – UW Hospitals & Clinics	Mon 9/9/19
Employer Files Production Signoff – WEDC	Mon 9/9/19
Employer Files Production Signoff – WHEDA	Mon 9/9/19

MILESTONES UP NEXT	
Milestones due in this month.	
Name	Finish
Employer Files Production Signoff – Central	Mon 9/9/19
Employer Files Production Signoff - Courts	Mon 9/9/19
Employer Files Production Signoff – Fox Valley Navigation Systems	Mon 9/9/19
Employer Files Production Signoff – UW Hospitals & Clinics	Mon 9/9/19
Employer Files Production Signoff – WEDC	Mon 9/9/19
Employer Files Production Signoff - WHEDA	Mon 9/9/19

COMPLETED MILESTONES	
Milestones that are 100% complete.	
Name	Finish
Conduct Implementation Kickoff Meeting (ETF & CYC)	Thu 5/9/19
Conduct Transition Kickoff Meeting (ETF, CYC, & TASC)	Fri 5/10/19
Employer Files Production Signoff – Wiscraft – Beyond Vision	Mon 9/9/19
Customer Service Lines Open	Sun 9/15/19