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Correspondence Memorandum

Date: January 26, 2024

To: Group Insurance Board

From: Liz Doss-Anderson, Ombudsperson
 Peggy McCullick, Ombudsperson
 Office of the Secretary

Subject: 2023 Ombudsperson Services Quality Assurance Report

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

The goal of Ombudsperson Services (OS) is to provide Wisconsin Retirement System members with the highest level of customer service related to escalated issues regarding their benefits administered by the Department of Employee Trust Funds (ETF). In addition, OS staff provides recommendations to various ETF divisions and offices based on day-to-day interactions with members, employers, health plans, and third-party administrators. These recommendations are based on issues these stakeholders identify, as well as any benefit program area in need of clarification or continuing education.

OS informs the Group Insurance Board (Board) about its activities via two annual reports: 1) the Quality Assurance Activity Report presented in February; and 2) the Education and Outreach Report presented in November. These reports supplement the Semi-Annual and Annual Case Reports and Annual Health Plan Grievance and Independent Review Report that OS provides the Board.

OS focuses on issues and initiatives that help members understand their benefits and the services available from their health plan, the Pharmacy Benefit Manager, and the supplemental plans. Due to the addition of new plans and networks, OS has been involved in cross-functional member communication strategies and planning sessions to anticipate and address member questions prior to and during the annual open enrollment period. Assisting members beginning their transition of care from their current plan to a new plan during open enrollment may require OS intervention to facilitate transitions for members with complex care or prior authorizations.

Examples of OS quality assurance activities and advocacy for members (Table 1) and plans (Table 2) from January - December 2023 are highlighted below.

Pamela L Henning

Board	Mtg Date	Item #
GIB	02.21.24	10H

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
 Electronically Signed 01/24/2024

Table 1. Examples of OS Quality Assurance Activities and Advocacy for Members (January - December 2023)

Member Focus	Description	Action
Notification of ETF Administrative Review Rights and Independent Review Rights	Annually, OS reviews vendor grievance letter language and grievance processes to ensure contract compliance and that members are getting the correct information in their grievance decision letters.	Collaborated with Office of Strategic Health Policy (OSHP) to make certain vendor contracts include required grievance information to OS and notification to vendors regarding annual submission requirements to OS. Took corrective action with plans as needed.
Website Enhancements	Information for members about Plan/Vendor Grievance and Appeal processes has not been available on the ETF website. Members are confused as to where to start with a benefit dispute with their plan/vendor or employer.	Worked with Office of Communications (OC), OSHP, Office of Legal Services, and Retirement Services to develop an OS area on the ETF website that provides members with information about how to resolve a dispute with their plan and, if necessary, how to file a grievance. In addition, members can learn when an ETF Administrative Review is available and helpful resources for members including the OS fact sheet, OS brochure, vendor contact information, and the ETF complaint form.
Open Enrollment Activities	The Health Insurance Application Enrollment/Change form is a complex form for members to complete when they have a change related to their insurance coverage.	Participated in It's Your Choice (IYC) Project Team to offer member perspective on IYC changes and communications to/from members. Participated in the ETF Customer Interaction Council led by OC. Reviewed documents and provided input related to IYC period communications including review of the health insurance applications for active employees and retirees.

Member Focus	Description	Action
Notification of Independent Review (IR) Requested by Member	Plans are required to notify ETF of a member's request for an IR. This must be done within five days of member request. In addition, plans are required to submit a redacted copy of the final and binding IR decision to OS.	Educated plans via Council on Health Plan Improvement that reporting IR to ETF is a contract requirement and what plans need to submit to OS. Notification of IRs allow ETF staff to review trends in medical necessity and experimental services from the IR organizations perspective.

Table 2. Examples of OS Quality Assurance Activities and Advocacy for Plans (January - December 2023)

Plan Focus	Description	Action
Benefit Clarifications	Throughout the year, plans will incorrectly interpret benefit provisions in the contract/Uniform Benefits resulting in a member complaint. For example, infertility coverage, durable medical equipment, or mental health benefits may not be interpreted correctly.	Worked with OSHP staff to determine correct interpretation of benefit administration and worked with the plan to update their processes to avoid similar cases in the future. Determined if further plan education is needed regarding benefits.

Looking Ahead

OS staff are seeking ways to function more efficiently and effectively. There is a need to systematically track member inquiries and actions, centrally collect and analyze the data, and enhance reporting. OS staff are working with the Office of Enterprise Initiatives staff to develop a new case management process within OnBase, an existing application at ETF. When the case management process is implemented, reporting case information and trends in OS will become more robust. In addition, new processes are being developed to streamline assistance for members when being assisted by OS staff.

OS will continue to collaborate with other divisions and offices within ETF on initiatives such as developing online resources, eLearning programs, and other educational materials for members about how best to access their benefits and resolve issues.

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