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## *Correspondence Memorandum*

**Date:** October 18, 2024

**To:** Group Insurance Board

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

**Subject:** 2024 Ombudsperson Services Education and Outreach Report

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

Ombudsperson Services (OS) works with Wisconsin Retirement System (WRS) members when their Department of Employee Trust Funds (ETF) administered benefits are escalated. OS focuses on issues and initiatives that would help members understand their benefits and services available from their health plan, the Pharmacy Benefit Manager, supplemental plans, and OS services. In addition, OS 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.

Topic	Description	Action
Community Outreach	Community resources benefit from education regarding WRS benefits and how these can assist our WRS members. These resources include Board on Aging and Long-Term Care (BOALTC) and the UW Center for Patient Partnerships (CPP), along with others.	Provide OS resources, annuitant health insurance and open enrollment information and education via OS annual presentation to BOALTC staff and managers.  Work with CPP to clarify coverage criteria for ongoing case with CPP and OS. Periodic presentations on the Group Health Insurance Program to students in the advocacy certificate program at CPP.

*Pamela L Henning*

Reviewed and approved by Pam Henning, Assistant Deputy Secretary  
 Electronically Signed 10/23/2024

Board	Mtg Date	Item #
GIB	11.13.24	17H

Topic	Description	Action
ETF Web Page Improvements	Members often turn to ETF's website to gather more information about their benefits, enrollment opportunities and how to resolve disputes with their plan or employer.	Requested update to Employee Reimbursement Account pages to include Optum claim form and claims submission contact information, including mailing address.  Encouraged development of a letter to all Flexible Spending Account (FSA) members regarding substantiation of claims and the payroll recoupment process to avoid member issues with their FSA.
Member Education	OS seeks opportunities to educate members on our program, provide information on how best to utilize their benefits, and avoid common problems with their benefits.	OS contributed to WRS News in 2023/2024. Articles included choosing a new health plan, mental health resources and introduction to ETF's Benefit Dispute web page.
ETF Staff Education	Ensuring ETF staff, particularly new hires, have the most current information regarding OS and how we can assist members with a positive member experience when working with ETF.	OS provided <i>Introduction to OS</i> for staff in ETF Employer Services Section, including Retiree Health Insurance staff, and the ETF Call Management Center. Developed training materials for the OnBase Application that OS utilizes for case management. All necessary ETF staff were trained on how to complete the Ombudsperson Intake Form in the OnBase Application to improve member experience with OS.

**Looking Ahead**

In 2025, OS will continue to look for opportunities to provide education to members and employers regarding WRS benefits. We will identify areas in need of outreach and education and provide appropriate resources. Working with our members, employers, and ETF staff, we will investigate the possibility of developing a satisfaction survey for members and employers who interact with OS to seek assistance with their WRS benefits. In addition, OS will continue to work with ETF's OnBase Product Owner. OnBase is ETF's modernized records imaging and case management solution. There are opportunities to utilize OnBase reporting for our Group Insurance Board Case Report beginning in May 2025.

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