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Correspondence Memorandum

Date: October 29, 2025

To: Group Insurance Board

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

Subject: 2025 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 questions or concerns related to 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 stakeholders identify, as well as any benefit program area in need of clarification or continuing education.

Topics Based on Issues or Cases	Description	Action
Community Outreach	Community resources benefit from education regarding WRS benefits and how they can assist our WRS members. These resources include Board on Aging and Long-Term Care (BOALTC), the Office of the Commissioner of Insurance, and the UW Center for Patient Partnerships (CPP).	Provide OS resources, annuitant health insurance issues, Open Enrollment information and education via OS annual presentation to BOALTC staff and managers. OS presented twice over the past year to students in the advocacy certificate program at CPP Topics included the Group Health Insurance Program (GHIP) and how best to advocate for members.

Pamela L Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Electronically Signed 10/28/2025

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Topics Based on Issues or Cases	Description	Action
ETF Website Improvements	Members often turn to ETF's website to gather more information about their benefits and enrollment opportunities, and how to resolve disputes with their plan or employer.	Requested updates to the Employee Reimbursement Account pages on the ETF website to include Optum and TASC claim forms and claims submission contact information, including mailing address. Feedback provided to Office of Strategic Health Policy. 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. OS also requested more information be added to the ETF website. Collaborated with Office of Communications staff to improve search function on the ETF website to provide more relevant search results.
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 an WRS News in 2025 regarding OS and how to access our services. Presented at the UW Milwaukee Retiree Association in May. Information included what OS can do to assist members and what we are unable to do. Additionally, OS educated attendees regarding Medicare enrollment, Accumulated Sick Leave, and GHIP benefits. Requested clarification for members regarding acupuncture coverage under the Case Management and Alternate Care and Treatment provision of Uniform Benefits. Began research on how best to educate members on their GHIP benefits and the documents that outline their benefits to improve the member experience and possibly avoid negative outcomes.

Topics Based on Issues or Cases	Description	Action
Employer Education	Providing information about OS and our role at ETF to employers helps to educate their employees on their benefits and how to get the most out of them.	At the 2026 Open Enrollment Employer Kickoff, OS provided employers with information regarding OS functions within ETF and with our vendors.
ETF Staff Education	Ensuring all ETF staff, in particular new hires, have the most current information regarding OS and how we can assist members with a positive member experience when working with ETF.	Developed training materials for the OnBase application that OS utilizes for case management. All necessary ETF staff were trained in how to complete the Ombudsperson Intake Form in the OnBase application to improve member experience with OS.

Looking Ahead

In 2026, OS will continue to look for opportunities to provide education to members and employers regarding WRS benefits. Due to changes in the vendor from Optum Financial to TASC for Pre-Tax Savings Accounts, we will identify areas in need of outreach and education and provide appropriate resources for members to ensure a smooth transition. In addition, OS will continue to look for new opportunities for outreach and education with our members, employers and internal staff.

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