

# SAN FRANCISCO HEALTH SERVICE SYSTEM

Affordable, Quality Benefits & Well-Being

## MEMORANDUM

DATE: January 11, 2018  
TO: Randy Scott, President, and Members of the Health Service Board  
FROM: Mitchell Griggs, Acting Executive Director SFHSS  
RE: December 2017 Board Report

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### HSS Personnel

- 1209 – Benefits Technician position; creating new list
- 1210 – Benefits Analyst position (2); reviewing current list, interviews begin mid-Jan
- 1802 – Research Assistant; job description is being written
- 1823 – Senior Administrative Analyst vacant; Position has been posted
- 5320 – Illustrator and Art Designer; interviews are complete, candidate selected
- 2819 – Assistant Health Educator (TEX) filled by Ava Foudeh

### Operations

- 2017 December over 2016 December, team performance improved as follows:
  - Decreased inbound call volume—confirmation letters indicated accurate enrollments.
  - Decreased drop-in consultations—confirmation letters indicated accurate enrollments.
  - Significantly increased speed of answer (48 seconds faster).
  - 264 fewer abandoned calls.
  - Regular enrollment processing and reporting is current.

### Enterprise Systems & Analytics

- Several more programming changes for the 2018 plan year have been migrated to the Production environment and work continues on the outstanding programs.
- Year-end reporting such as the W-2 Box 12 DD, W-2 Box 10 and IRS Forms 1099 and 1095.
- Extracting, analyzing and preparing data for presentation of the Annual report and the Demographic report.

## **Finance and Accounting**

- Began FY 2018-19 and FY 2019-20 budget development to meet reduction targets, proposed budget will be presented in February.

### **Financial System Project**

- F\$P Conversion Data Cleanup Project – budget for carryforward purchase orders completed, pending final cleanup process by Controller’s Office.
- Pending posting of beginning cash balance by the City.
- Received reports on budget vs. actuals.

### **Contracting and Vendor Management**

- Issued Request for Proposals for Retiree Health and Well-being Campaign.
- Issued Request for Proposals for workplace ergonomics website.
- Posted recruitment for 1823 Senior Administrative Analyst with specialty in contracting.

## **Communications**

- Prepared and completed letter and artwork for 74,000 Open Enrollment Confirmation Letters mailed out to members in December.
- Prepared and completed five separate post-open enrollment notification mailings to members including 1,000 Domestic Partner Declaration Letter and Forms.
- Revise and update sfhss.org website and SFHSS forms and applications for 2018 Plan Year.
- Begin preparing 2017 Annual Report.
- Prepare for onboarding and orientation of new graphic designer.

## **Well-being**

- EAP has seen an 11% increase in organizational services, a 27% in people served by organizational services, and a 36% increase in the number of counseling hours in 2017 compared to 2016 YTD.
- EAP reached out to City employees and departments to offer support following the passing of Mayor Lee.
- 19 departments achieved a Well-Being@Work Award. The Award Ceremony is planned for February 7, 2018.
- 16 onsite activities were offered in December for a YTD total of 296 (flu clinics reported separately).

**Directors Meetings/Presentations/Misc.**

- Met with Aon Hewitt
- Controller's People & Pay division (eMerge) Executive Steering Committee
- Attended Mayor's monthly Department Head meetings
- Participated in weekly calls with Blue Shield regarding Trio HMO implementation and communication strategy
- Met weekly with HSS staff for Open Enrollment planning and development of self-service benefits 2017 pilot for Open Enrollment
- Kaiser Permanente Plan Utilization Review 2017 Q2 meeting
- HSS all-staff meeting; team building breakfast and recognition of open enrollment work
- Blue Shield Semi Annual Utilization & ACO Advisory meetings
- Best Doctors Program Performance meeting

# Management Report

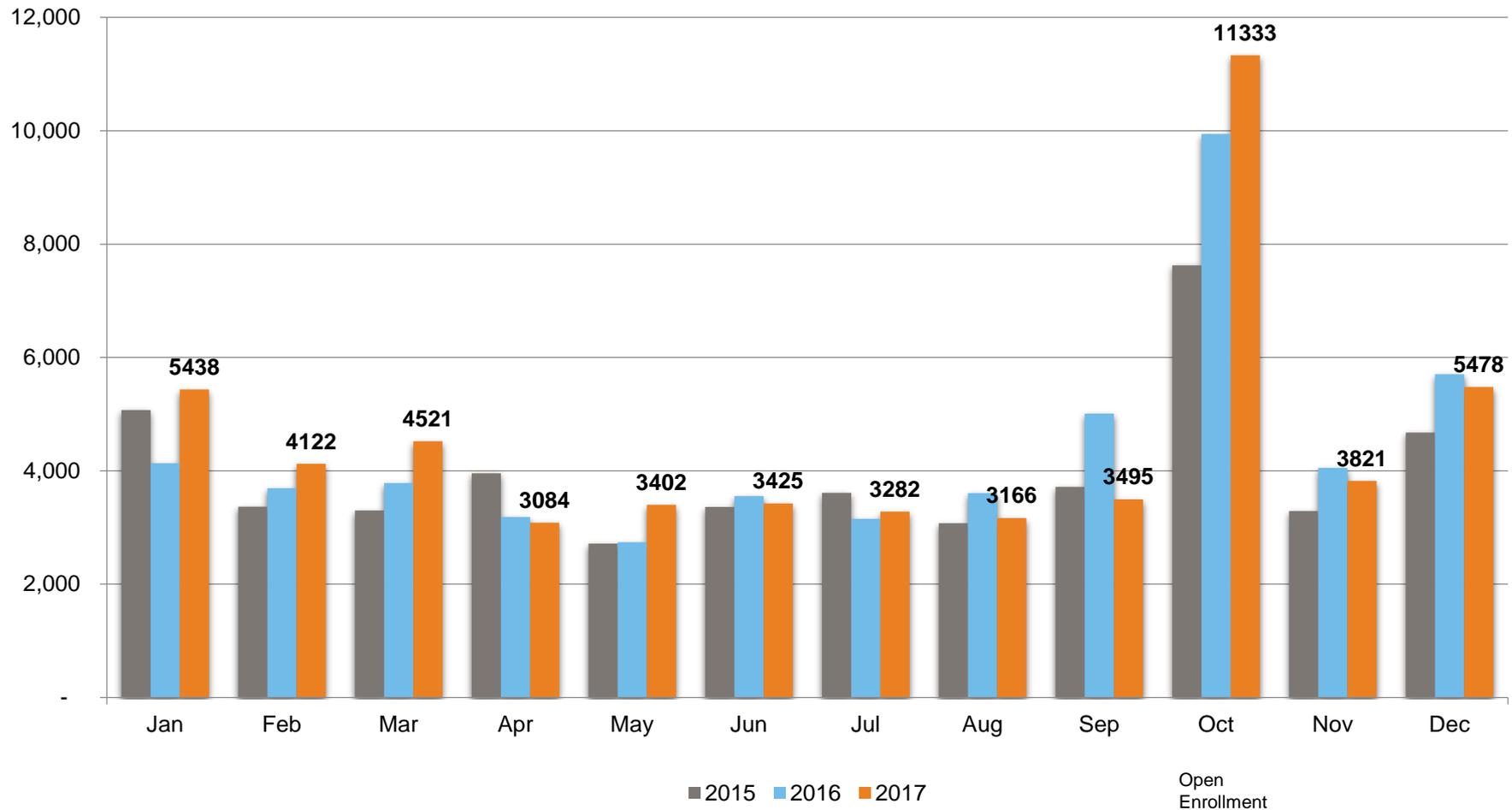
OPERATIONS UPDATE | January 2018

# Calls and Office Visits: December 2017

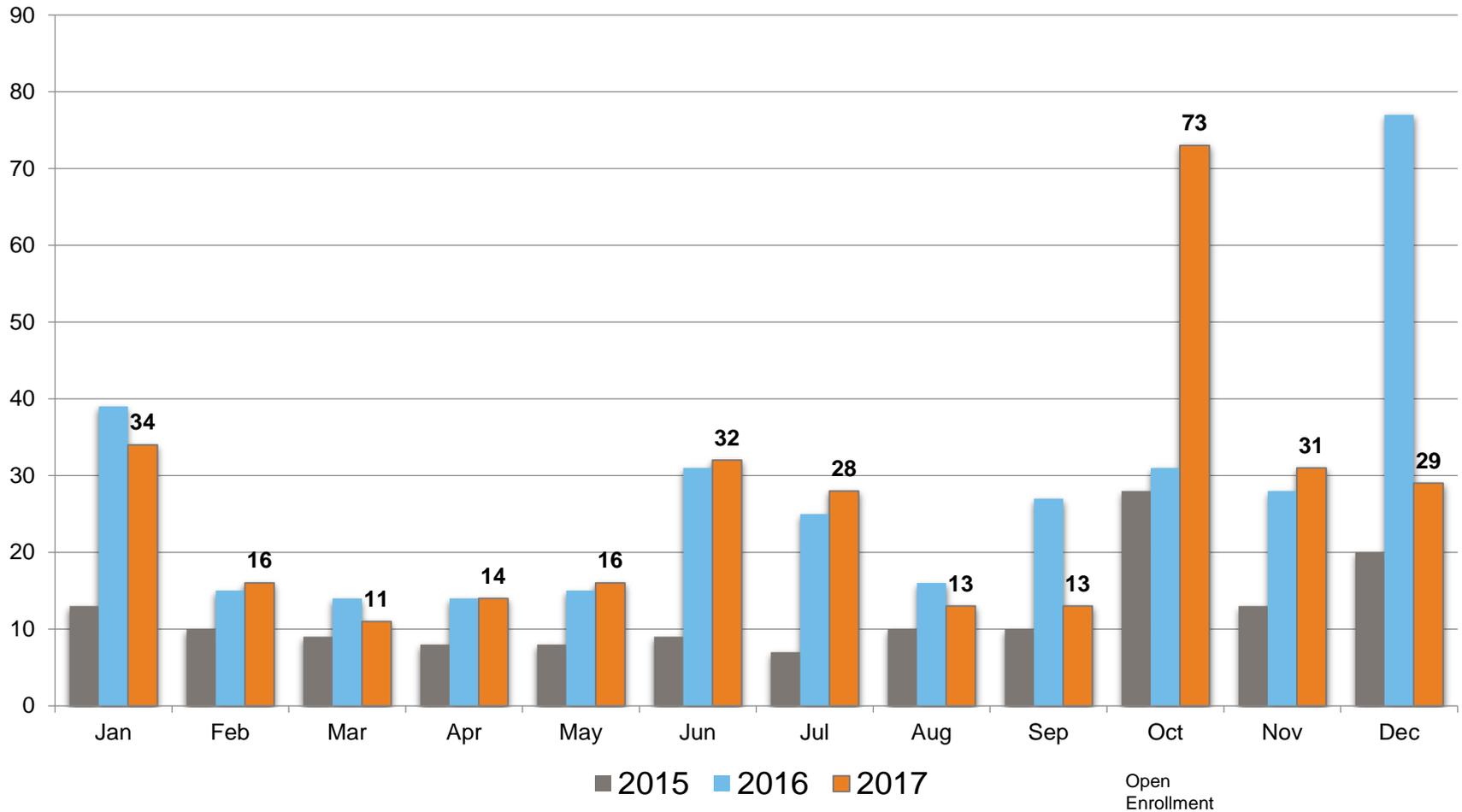
## Calls and In-person Assistance total:

- Inbound calls: 5,478 answered calls (4.0% ↓ from 2016)
- Speed of answer: 29 seconds (62.3% ↓ from 2016)
- Abandonment rate: 1.4% (76 calls)
- In-person assistance: 1,221 members (9% ↓ from 2016)

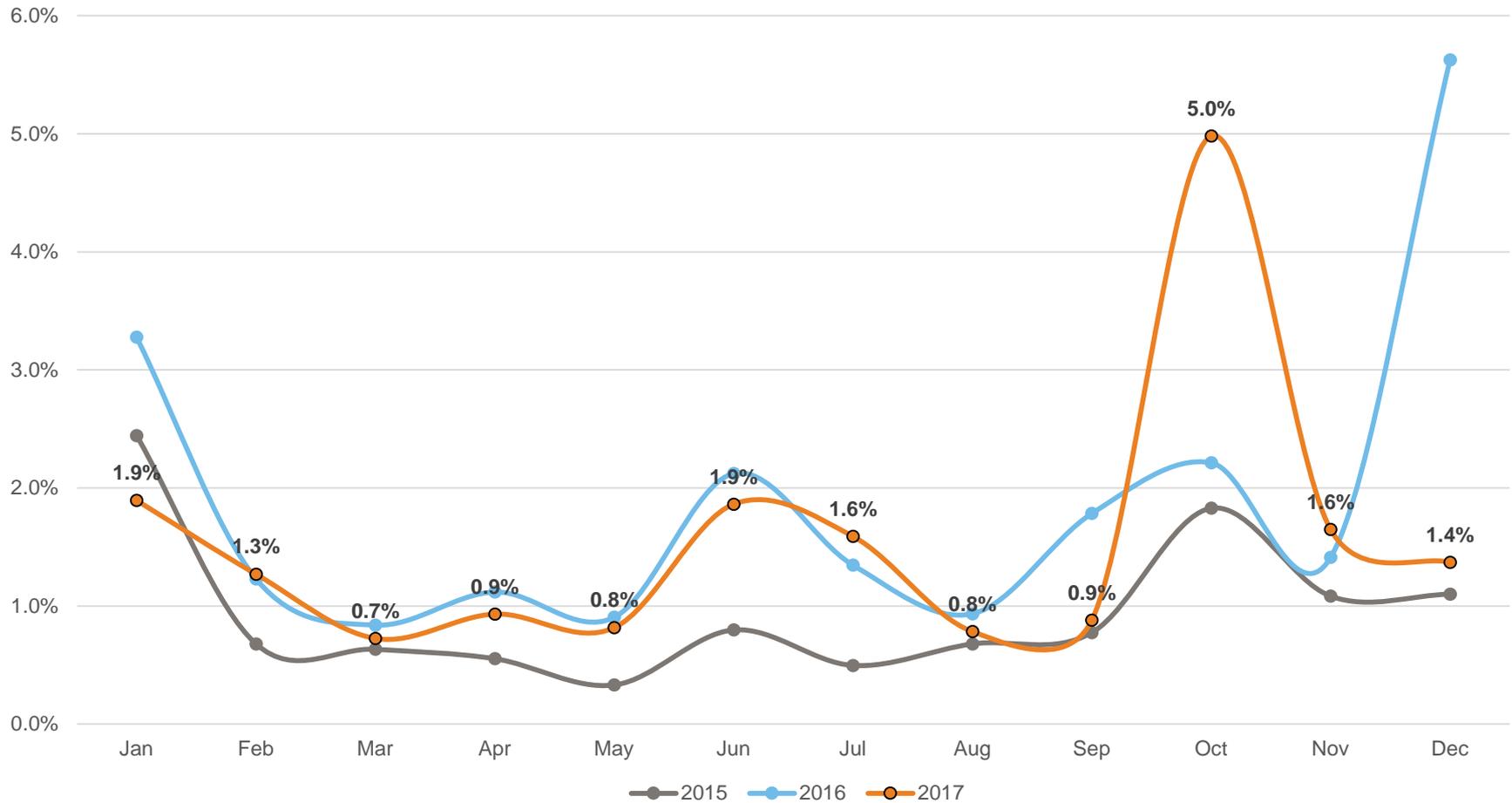
# Inbound Calls: December 2017



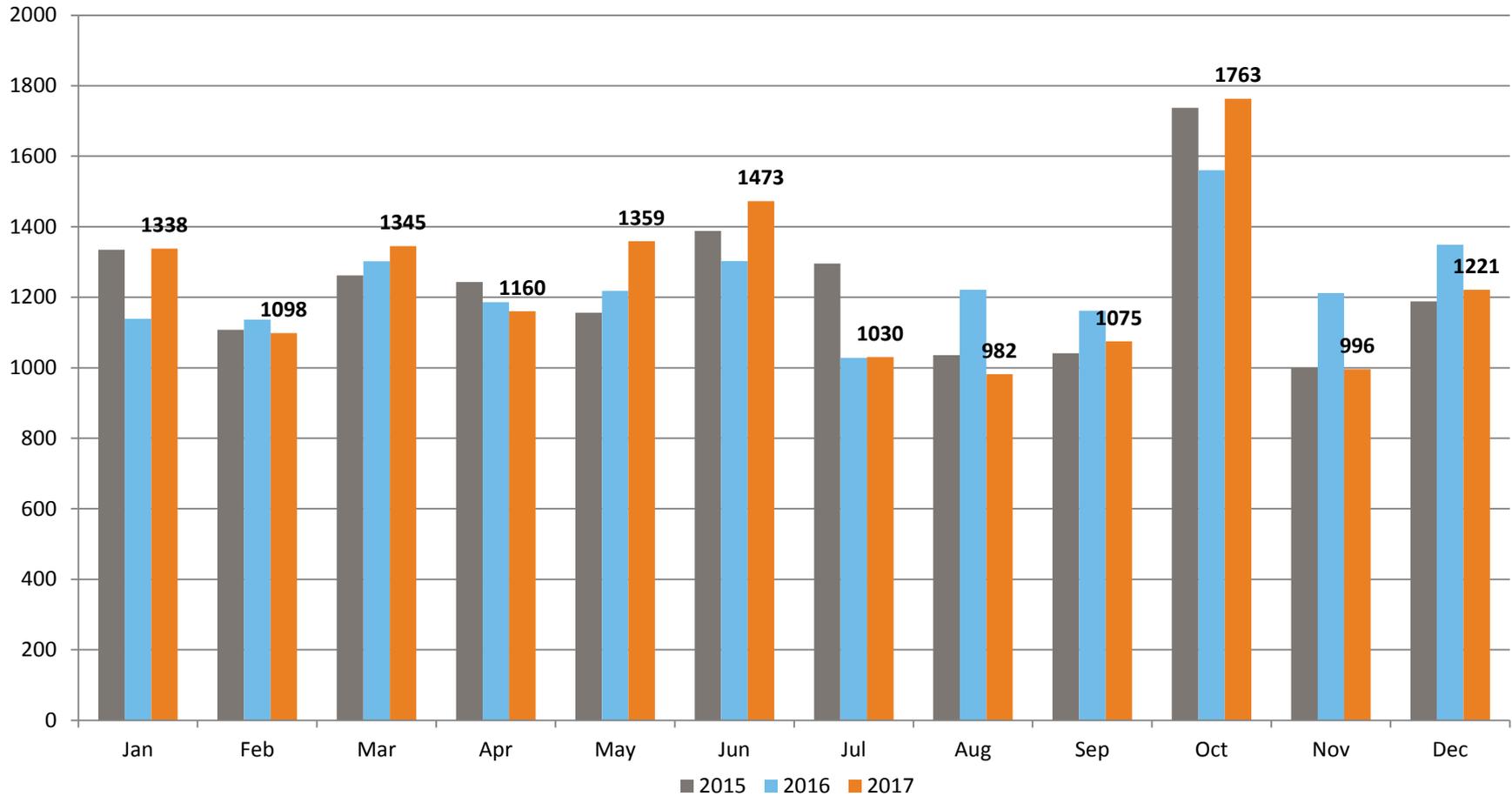
# Average Speed of Answer: December 2017



# Abandonment Rate: December 2017



# In-person Assistance: December 2017



# Delinquencies & Terminations: December 2017

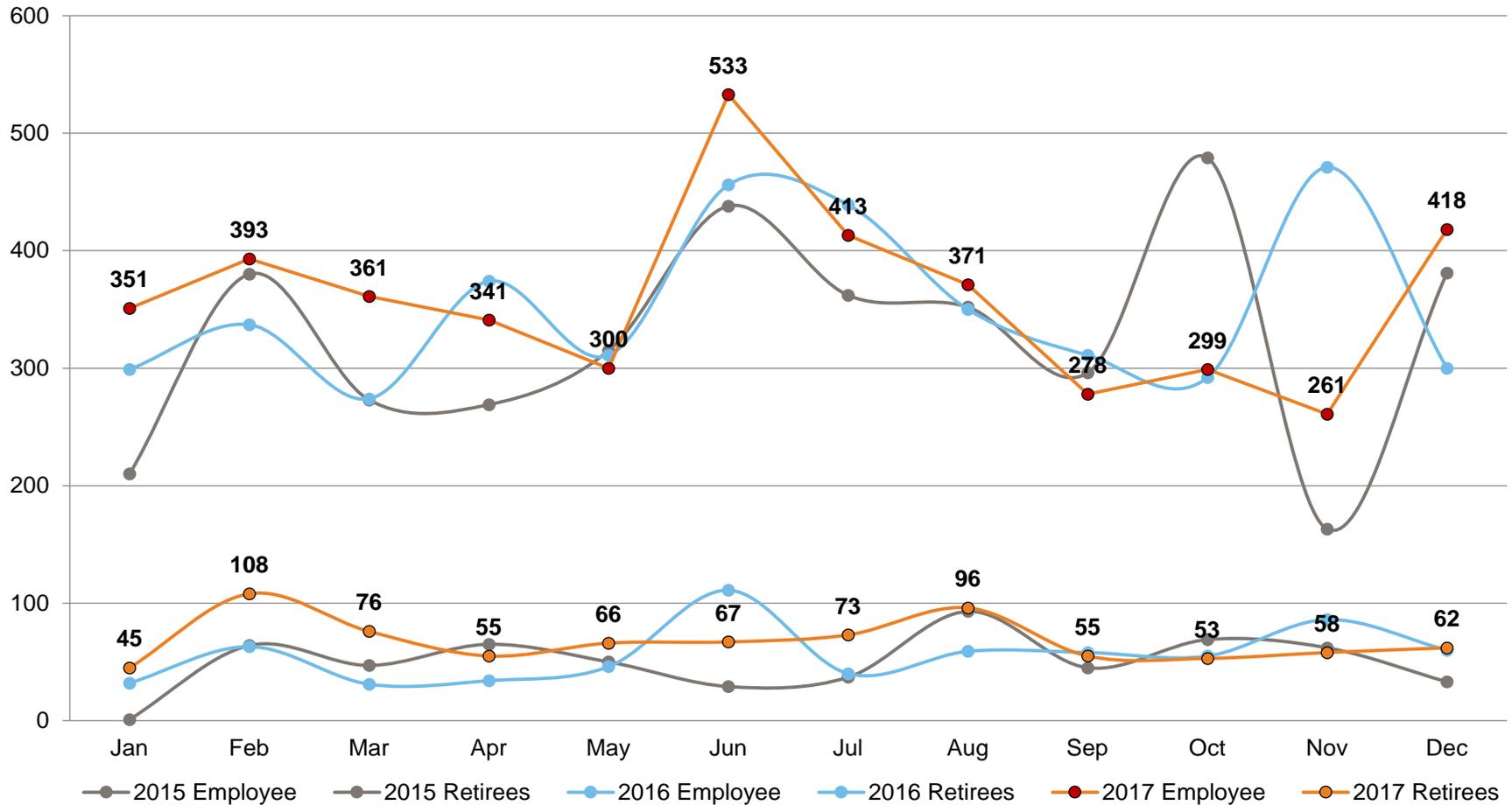
## Delinquency Notices Sent.

- Employees: 418
- Retirees: 62

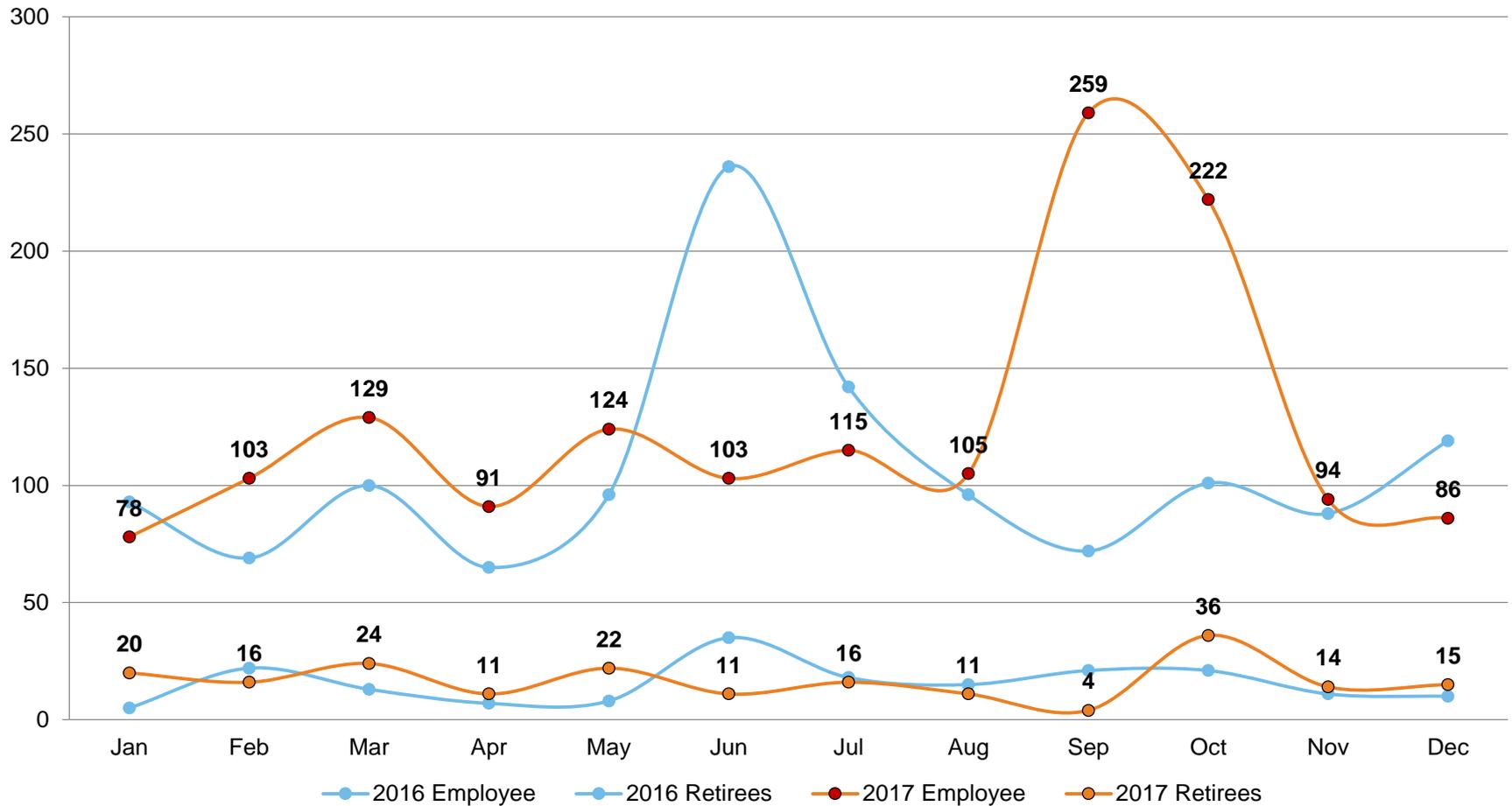
## Termination Notices Sent.

- Employees: 86
- Retirees: 15

# Delinquency Notices: December 2017



# Termination Notices: December 2017



# Management Report

ENTERPRISE SYSTEMS & ANALYTICS | January 11, 2018

## PeopleSoft / Benefits Administration

- Completed year end IRS W-2 Box 12DD data files
- Completed year-end IRS Form 1099 data files
- Generated address files for annual domestic partner tax certification mailing
- Completed development and testing of plan year required changes to 3 additional programs
  - SFERS Payroll Actual program
  - PERS payroll Actual program
  - Deduction Process Change program
- Generated audit queries for new plan year enrollments and provided discrepancies to Member Services
- Reviewed IRS W-2 Box 10 Dependent Care amount

## Data Analytics

- Completed testing of required changes to IRS Form 1095
- Provided demographic data for 2017 annual report
- Completed annual report for SB-90 on health care costs associated with survivors of safety officers killed in the line of duty
- Extracted all data required for generating annual demographic report. Currently calculating derived values and generating tables and charts

## IT Initiatives

- Conducted Open Enrollment post-mortem debriefs
- Attended CityBase (new credit card processor) kickoff meeting 12/18
- Met with Coalfire (vendor engaged by Treasurer Tax Collector to ensure we are compliant with Payment Card Industry requirements 12/11
- Disposed of legacy server in accordance with data destruction compliance requirements

## Meetings attended by staff

### Miscellaneous:

- Attended Truven Public Sector Group Training on Service Categories 12/27
- Attended Microsoft Power BI training 12/19
- Attended Payment Gateway Vendor Demo Sessions 12/11
- Attended quarterly PMO group meeting 12/8
- Attended eBenefits Upgrade Project meeting 12/7

# Management Report

FINANCE and CONTRACTING | January 2018

# Finance and Contracting Activities Update

## Finance and Accounting

- New processes for Blue Shield Trio, Kaiser Multi-Region, and VSP Buy-Up initiated effective January 1, 2018
- Began FY 2018-19 and FY 2019-20 budget development to meet reduction targets, proposed budget will be presented in February

## Financial System Project

- F\$P Conversion Data Cleanup Project – budget for carryforward purchase orders completed, pending final cleanup process by Controller's Office
- Pending posting of beginning cash balance by the City
- Received reports on budget vs. actuals

# Finance and Contracting Activities Update

## Contracting and Vendor Management

- Fully executed Amendment to Agreement with Citizen for 2018 'Heart Health' Well-being campaign
- Fully executed Amendment to Agreement with Aon for 2018 Dependent Eligibility Verification Audit
- Issued Request for Proposals for Retiree Health and Well-being Campaign
- Issued Request for Proposals for workplace ergonomics website
- Posted recruitment for 1823 Senior Administrative Analyst with specialty in contracting

# Management Report

COMMUNICATIONS | January 2018

# Communications Overview – December 2017

- ✓ Over 74,000 Open Enrollment Confirmation Letters were mailed out to members in December. Prepare copy, artwork for six separate letters; coordinate closely with Data Analytics team on rounds of merging of test data and ensuring layouts formatted properly.
- ✓ Prepared and completed over 1,000 Domestic Partner Declaration Letter and Form mailing to members.
- ✓ Prepared and completed over 250 Auto-pay Notification Letter mailing to San Francisco Commissioner employees.
- ✓ Prepared and completed over 15 Imputed Income Notification Letter mailing.
- ✓ Draft and complete series of notification, denial and other letters for 2018 Plan Year.
- ✓ Revise and update SFHSS enrollment and other standard HSS forms and applications for 2018 Plan Year.
- ✓ Sfhss.org website updated for 2018 Plan Year.

## Communications Overview – December 2017

- ✓ Commence drafting 2017 Annual Report and reviewing content with Director, Finance, Enterprise System and Analytics teams.
- ✓ Review and prepare 2018 Open Enrollment calendar on behalf of Communications for Open Enrollment Project Manager.
- ✓ Begin revising new hire orientation presentation for Operations team.
- ✓ Prepare for on-boarding and orientation of new graphic designer including revising brochures and handouts for 2018 Plan Year.
- ✓ Prepare creative briefs for new hire and preparing for retirement videos.
- ✓ Attend Retiree presentation with Member Services team; meet with Member Services analysts to understand frequently asked questions and topics important to members.

# eNews December 2017

	December 2017		December 2016	
Total Delivered	15,623	99%	15,759	
Opened	6,781	43%	5,232	33.3%
Clicked Links	715	6%		

# Management Report

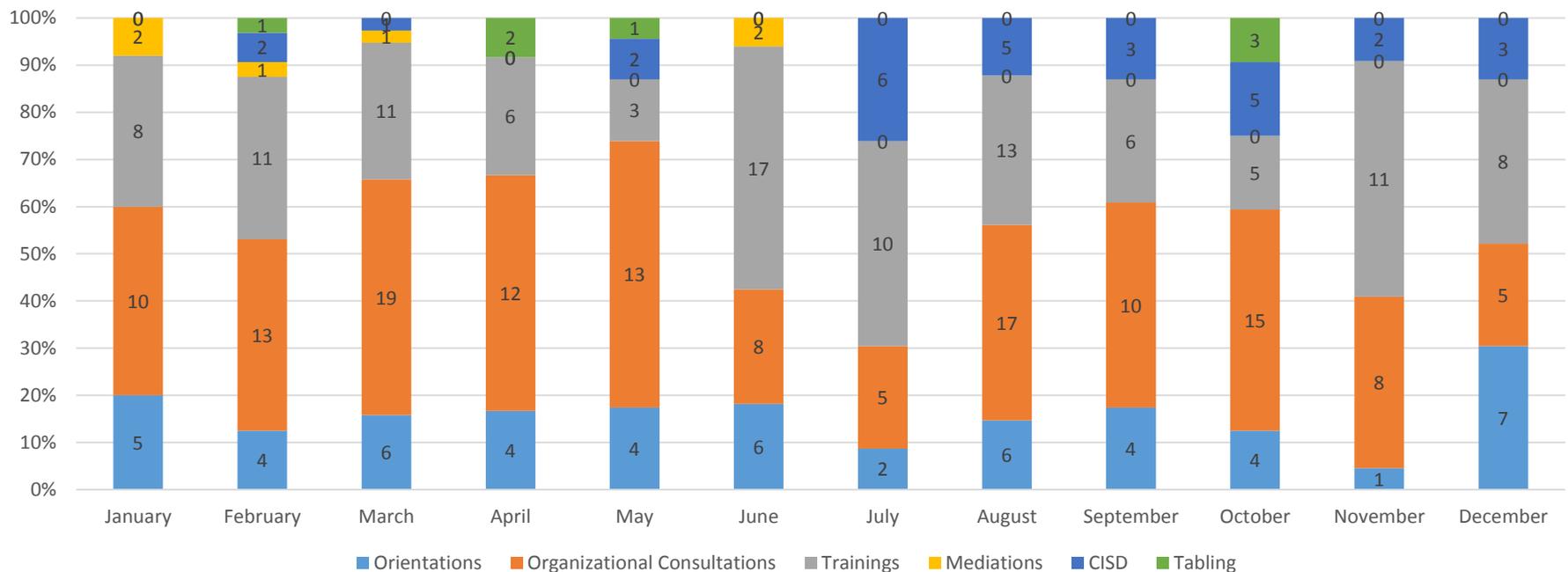
WELL-BEING UPDATE | January 2018

# Employee Assistance Program: Organizational Well-Being

11% increase in organizational services provided in 2017 compared to 2016 (YTD)

- 339 services in 2017, 206 services in 2016

Number and Percentage of Organizational Services by Type and Month: YTD 2017

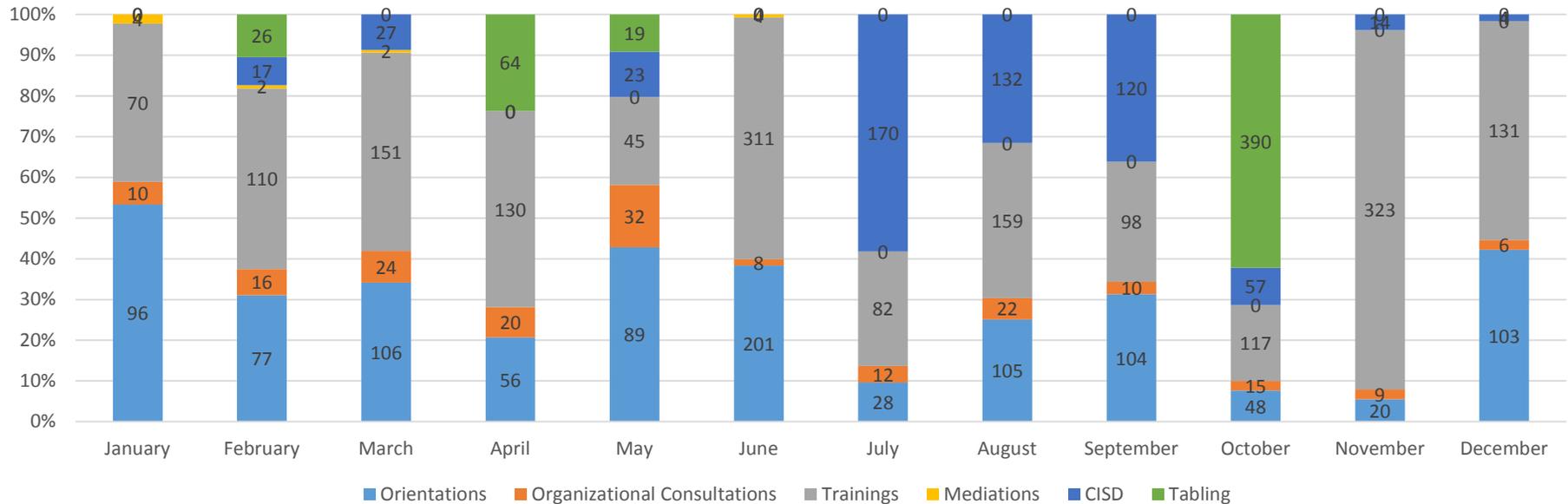


# Employee Assistance Program: Organizational Well-Being

27% increase in people served by organizational services in 2017 compared to 2016 (YTD)

- 4019 people served in 2017, 3161 services in 2016

Number and Percentage of People Served via Organizational Services by Type and Month: YTD 2017

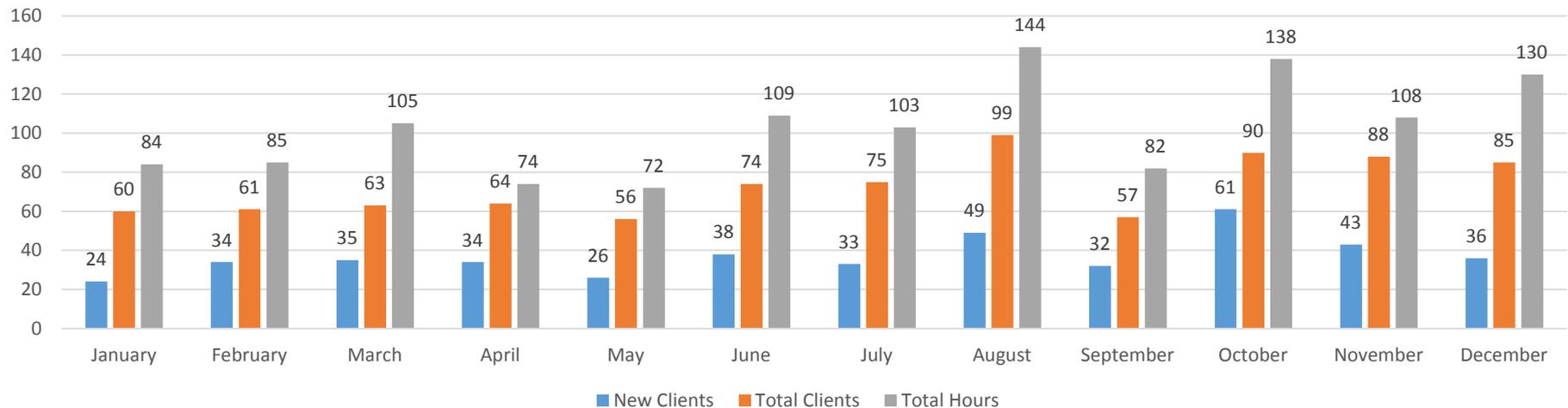


# Employee Assistance Program: Counseling Update

Comparison to 2016 YTD:

- 54% increase in New Clients
- 37% increase in Total Clients
- 36% increase in Total Hours of Service

EAP Clinical Services: YTD 2017



## Well-Being@Work Update:

### Well-Being@Work Awards

- 19 Departments completed Well-Being@Work Awards for 2017. 5 Flying Awards (second-tier) and 14 Soaring Awards (top-tier).

### Department Lead and Director Communications

- December update – Awards Update, Champion Training, Save the date for Well-Being@Work Award Ceremony

# Well-Being@Work Champion Training:

Offered through December 5-19

- 9 Champion Trainings Offered (5 offsite)
- 84 Champions Trained
- Training topic: Live, Feel & Be Better in 2018

## Live, Feel & Be Better in 2018

- Year-long campaign to support member goals in three areas: weight loss, lower blood pressure, and consistency in healthy habits
- Aimed to Empower Members to take action with three steps to initiate goals:
  - Step 1: Know Your Numbers- learn your health risk factors
  - Step 2: Take the Pledge- make a commitment to live feel and be better in 2018
  - Step 3: Choose a Program- use your well-being resources and get started with a program that works best for you!

# Onsite (Departments) Activities Update

- 296 onsite activities in 2017 YTD (flu clinics reported separately)

2017 Onsite Activities at Worksite

