



The RDS Secure Website Modernization Launch Webinar Re-Watch Party Transcript: April 7, 2022

Thank you all for participating in today's event: The New RDS Secure Website Launch Webinar. We expect today's presentation to run for just under 30 minutes, and shortly after the event has concluded we'll post a link to the webinar recording and a link to the full transcript.

Today we'll be streaming video and audio to you through Zoom, but we will not be connecting to your facecam or your microphone. So effectively, you'll be in 'listen-only mode'. On that note, please check that you have sound coming from the preferred speaker and the volume level is comfortable. If you prefer to join by phone to receive audio, please dial 833-568-8864 and enter access code 161 915 6026.

As a reminder, this presentation is intended to be a general summary of current policy and operations but does not take the place of the statutes, regulations, or formal policy guidance provided by CMS.

Alright, so let's take a look at our agenda today. First, we're going to go over the RDS secure website modernization project and talk about the various ways we've collaborated with the user community to arrive at the new RDS secure website redesign, and then we're going to show you parts of the new redesign and highlight some of the most notable benefits for you.

Then we're going to dig a little bit deeper and take a look at the most prominent changes and the net-new features that you'll enjoy in the new system, and after that we'll do a high-level walkthrough of a few of the functional areas so you can get a feel for the new design.

Then we'll briefly talk about the updated resources that will be available to you once the new site goes live in early 2022, and lastly, we'll wrap up and let you know the best way to submit any questions that you might have.

So, with that, let's go ahead and dive in. So, for the last few years, CMS has been modernizing the RDS secure website with the goal of providing an intuitive, easy-to-use, and empathetic system based on the values of our plan sponsor community and we also wanted to consider the needs of the vendors who support them.

Back in 2018, we began by first announcing the modernization effort itself, and conducting our first webinar and user feedback session. Then in 2019, we recruited volunteers to participate in listening sessions so we could better understand the needs and wants our users. Then in 2020, we recruited more volunteers to participate in usability testing sessions to obtain feedback on our early designs that we'd been building and developing in the background.

And then in 2021, we hosted a listening session webinar similar to this one where we walked through the annual plan application and payment setup processes, and then later in 2021 we conducted even more usability testing sessions to obtain feedback on the application dashboard and reconciliation pages that had been under development.

So in addition to all of that structured user outreach and collaboration efforts, we arrived at the new design by evaluating data from other angles as well, most notably by analyzing past support tickets and email feedback from our user community to solve common problems before they happen.

We've been hard at work designing a new interface that's much more intuitive and efficient than what you're using today. You'll notice new easier navigation and task progression for almost all the sections of the application with fewer steps for most of these processes. We've also updated page language and instructional prompts so they're more concise, easier to understand, and more relevant to the page you're on.



We also made sure the actions on each page are visible and clear, so you don't get stuck wondering "what's next?" We're also implementing new functionality that will help you complete your work faster, so some examples of those efficiencies are like I mentioned, streamlining the steps for the application submission, for the payment setup and reconciliation processes, so this means there will be fewer steps to some of those major tasks and, where appropriate, we've combined steps to group like-items and keep the flow of your work more seamless, and cluster things so that they live on the page you expect them to be on.

We've also eliminated most of the redundant confirmation and verification screens, so instead of making you click 'yes' three times, we now believe you when you take an action in the app, so we think that will be a benefit as well, as we've heard from our user community that that was a hardship in the past.

Moving on to some of the major changes, first we'll talk about some of the procedural changes. Not really a change, but worth reiterating, all RDS applications' payment frequency now defaults to monthly instead of quarterly or annually. So, this means that you can submit up to 12 interim payment requests per plan year. This was announced back on May 8, 2020, so go ahead and refer back to the announcement on that date on payment frequency to read the policy in detail.

Something that is new coming up: regardless of the retiree list submission method that you've chosen for your benefit option, the secure website will always be copied on response files. So even if you have a vendor processing your retiree data, the secure website will always receive a copy of those response files. This is a new default for the program now, you don't have to change any settings or do anything.

And for all you Authorized Representatives on the call, you'll be pleased to see that you won't need to enter your security question responses to submit an application anymore. As long as you're logged in using your 2-factor authentication, the security question responses are no longer a security requirement needed to validate that you are who you say you are. So hopefully that will save you some headache and heartache as well.

When it comes to submitting a support request, we'll now be displaying a recommended answer to you rather than sending an E-mail and ending that interaction on the page, so our hope here is to guide you to a helpful response to get you quickly back on track based on where you're at in the process and what has worked for other users.

Before we look at specific UI changes within the application itself, we're excited to announce that you'll be able to remove a designee from all applications all at once with just one action in the new secure website, so if a designee leaves the company or changes roles, you can bulk-remove them and their privileges from all the applications that they are listed on.

For the first time, you'll be able to rename your application at any point in the process. So, if your naming conventions change over time at your company, feel free to update your application names so that they hold the most meaning to you.

Additionally, we've made it even quicker and easier to get that application deadline extension taken care of, the link is now situated right next to the application deadline in the summary section. We've also included more summary information throughout the secure website to help you see relevant data at a glance, so specifically we have Plan Sponsor and Team sections on the application overview page with all the pertinent players on the application dates to be mindful of, and the status of commonly tracked items like attestation and the initial retiree list. We have similar information under Manage Retirees and Reconciliation.

When creating applications under the same Plan Sponsor, you'll have all previously used banking information listed and available to choose from so it will appear in a list, any different accounts that have been used on this Plan Sponsor, and you won't have to re-type all the banking information from scratch.



Likewise, all previously used Designee names will be available in a drop down so you can quickly recognize who to add to the new annual application and set their privileges accordingly. We've also added a visual mapping to help you see which cost reporters you've assigned to each benefit option so, we expect this will especially be beneficial to those of you who have lots of benefit options or vendor relationships where you have vendor designees set to various benefit options. Either way, it's a great new update that we have coming for you.

Lastly but not least, we are also introducing a copy application function. This will allow you to easily reuse a previous year's application as a base for this year's application. It lets you pull over all the previous plan sponsor information, it auto-fills in your plan start and end dates based on last year's start and end dates, it pulls in the banking information, the actuary, the benefit option configurations, and it remembers those designees as well so it's nice because it still gives you the flexibility to update any of that information that you may want to change before proceeding with this year's application.

What's great about this new feature is you won't have to manually type in all the static information that doesn't typically change year over year -- that data will be pulled in automatically for you.

What we learned from listening to users is that many of you had very creative ways to ensure you typed in all the correct information identically year over year. Some of you printed out the application information and re-typed it, and some of you kept your own Master File, like a master file of record, and used that as a base to create each application every year, so thank you for sharing your stories and hanging in there, we don't think you should have to work that hard either, so finally this hardship is going away in 2022 and we couldn't be more excited to deliver that to you.

Here is our new and improved home dashboard page. This is the page that you'll see when you first log in to the secure website. It displays all the applications that you have permission to see for all the plan sponsors that you support, so I know we have a lot of test applications in here right now but as I scroll through here real quick, just note that we have several different plan sponsors that I'm highlighting right now, we have 3 different plan sponsors here, so you can sort any of the columns as you wish to help you find what you're looking for more quickly, we can sort by plan sponsor, by plan name, which oftentimes has the year in it, we can sort by the Application ID if you have that jotted down somewhere, what status it's in, there are several statuses that your application will move through throughout the process. You can also sort by your start and end date of your plan year, as you get further down and have interim payments, you can sort by total paid to date, that can be helpful as well, as well as the application deadline and reconciliation deadline.

We have some tabs up here. You'll notice 'in progress' which is going to show you all of your active applications, we also have a section called 'Completed' which is going to display only those applications who have completed reconciliation. And we also have a third section called 'Archived'. The Archived section is going to show applications that have been withdrawn, deleted, denied, or that have missed their Reconciliation deadline.

Alright, so for us to review some of the major functional areas of the secure website, we're going to pop into 1 or 2 of these test applications and we're going to see what we can see. I'm going to click on this test application here, it looks like it is pretty far along the process, it's in reconciliation, the cost reporting actually is closed, I'm looking here at the application status -- it says "reconciliation cost reporting closed" right here, but it does still show you all that pertinent information: your plan sponsor ID and name, account manager, authorized representative, the application name, the plan dates, the app ID, application deadline, reconciliation deadline, various other things like the fact that it's been attested, obviously since it's in reconciliation.

So, you can see here that this is your home base for any information you want to know about your application, and this also will show you who's on your team, who's working on this application with you. In



this case, we just have the account manager and one designee as well as the actuary, but this list can grow depending on your business needs.

So, let's take a look at... I'll just click real quick through here so you can see these benefit options. Although they're not in 'edit mode,' I can enter into edit mode just to show you what this would look like if we were entering them for the first time.

You would name your benefit option, you would then enter in that Unique Benefit Option Identifier,

which cannot be changed, which is why we are unable to edit it at this time. You can select the type, it's either Self-Funded or Fully Insured just like today, and the Retiree Submission Method, likewise, you have various choices to meet your business needs as well there. So, I'm going to go ahead and cancel out of this, but this is just to show you while you're in the application building phase of your application, you can build these benefit options to match exactly what your needs are.

Just to show you here, this is the actuary page. We assigned our actuary and then, after processing the submission of the application, they went in and attested that each benefit option meets the regulations and requirements; So, this is more of an informational page at this stage in the application.

The banking information: this is where you can either type in or pull in from previous plan sponsor banking information, and you can edit this at any time because we understand that things can change throughout the year, and we want to make sure that those payments are going to the right place.

And then we can view here this Review and Submit page, so back when you're creating your initial application, this page would unlock after all the benefit options are put forth and after the actuary has done their attestation and everything's correct, this page would come forward for the Authorized Representative to a push through the actual application itself. But everyone can view it as a summary page, so that's why this is here.

Alright, let's skip down to Manage Designees. So obviously this has been done before since this application is pretty far along, but what we can see here is that we have 1 designee, and that just happens to be the only designee. If we needed to add new designees, we just add a new designee, put in their e-mail and search, and we can add them to the application.

So now let's go ahead and look at submitting the Valid Initial Retiree List. Just like today, you'll navigate to the Manage Retirees section, and most of the Manage Retirees section functionality hasn't changed all that much we did try to consolidate some pages and have some information a little bit clearer along the way, easier to navigate, so you'll notice here on this main page you have some summary information about the application including the application ID, the plan name, what the status of the application is, and what the application deadline is, which we include here so that the plan sponsors know when they need to submit that Initial Retiree List by, so we're reiterating that here for that reason.

And then down here we have some summary totals and information on when file activity has occurred. We can also go ahead and expand this Retiree Counts by Benefit Option table, which summarizes all the information here for each of our benefit options, how many unique retiree counts per benefit option, etc. You can also click in and view the monthly retiree counts, so as those numbers go up and down month by month based on the file that's been submitted, this table summarizes the information for you here.

So, what we're going to do now is click on this Retiree and Response Files section and this is where you're going to upload your retiree file. Now since this application has already entered reconciliation, we can't upload a retiree file at this point, but we can see that this application previously uploaded their file, which we can see here on the Uploaded Retiree Files table. And if we scroll down a little more, we can also see that there is a Retiree Response File here as well. And they're all on the same page.



One of the other enhancements that we've made to the secure website is around the Covered Retiree List, so we've combined multiple pages together so that the place where you request your covered retiree list and the place where you download your covered retiree list are in the page.

So, you can see here that back in August, this application requested their cover retiree list and it's located right here. It's available for download as a link. Now, if this application status were not in reconciliation, we could use this request covered retiree list button here, which now is grayed out but if we were earlier in the process this button would not be grayed out, we could request it, and then a new file would be generated with a new link above this one.

Not a lot of changes at all to the weekly notification files section, this is just where those notification files, when they come in this is where they'll be. and not a lot of changes here either to the Part D Rejection Notification section. This is just where they're located.

So, let's go ahead and move on to Payment Setup. The first page in this section is the payment setup page which has a few different sections, one of which is the account manager section, so this is where you're going to select the permissions or privileges for your account manager. Is your account manager going to be a payment requestor? Are they going to be a cost reporter? Or will they have read-only access? Whatever best meets your business needs; in this case we've chosen to be a cost reporter as the account manager.

Scrolling down, we see the Benefit Option and Cost Reporter Summary section, so this just states your Benefit Options by name and UBOI and lists who the cost reporters are for each of those benefit options. Right now, it's just showing us as the account manager.

Returning to our left navigation menu, let's go ahead and click on the Payment Requesters section. This page is going to show us the Plan Sponsor Payment Requesters. The Authorized Representative is always a payment requestor, and can never report costs, so obviously the Authorized Representative is listed as a payment requestor on this table. This application also has a designee listed as a payment requestor.

Now let's go ahead and click on Identify Cost Reporters. As I mentioned earlier, the account manager elected to be a cost reporter in the previous screen, so therefore, the account manager is listed here as a plan sponsor cost reporter. Scrolling down, we can see there is a section dedicated to vendor cost reporters. If you work with a vendor or multiple vendors, this is where you will add that vendor to your application. You simply click the 'Add Vendor' button, you type in their vendor ID, and click search to find that vendor, and then you can add that vendor to your application.

So now let's move on to the Assign Cost Reporters to Benefit Options section. We looked at this briefly earlier in the webinar. This is the same area where it will show you all of the cost reporters that you've listed, whether they be yourself as an account manager or whether it be various designees or vendor designees, this table will show which individuals have cost reporter privileges for each benefit option on your application. So right now, this happens to be a very simple table because we only have one cost reporter and two benefit options, but many of you may have more complicated applications than this example here where you may have two or three or four different cost reporters, and multiple different benefit options, so we believe that this matrix can be helpful to keep that data clear in your mind as to who's doing what and who has what privilege for which benefit option.

And of course, to support all these enhancements, we'll be publishing a fully updated User Guide, Common Questions, and other educational support materials. Any future materials will be developed as needed to help create a smooth transition as the user community becomes fluent in the new secure website, so please let us know what you need and how we can better support you.



Just to reflect on what we've covered today, we talked about the RDS secure website modernization and what we've done over the years to progress this effort and make sure that your needs are heard and reflected in this new redesign. We talked about some of the major benefits to you from these changes, we've gone over what those changes are, and what you can expect for some of these major functional areas. And we talked about the different resources that are going to be updated to help support you in this transition.

It's time to get excited! We'll be rolling out the new Secure Website next week on Friday April 15th!

Just as a quick caveat, the screens we showed today were captured back in January and may change slightly due to development activities.

If you have any questions about what we've gone over today, or any questions in general about the secure website modernization project, please submit a support request or send us an e-mail at RDS@cms.hhs.gov. And as always, please do not include any PHI or PII in any correspondence with CMS' RDS Center.

Thank you so much for joining us today and throughout this journey. It really means a lot to us to improve your user experience, so thanks again for joining us and have a great day!