



## The New RDS Secure Website Launch Webinar Transcript: January 14, 2022

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00:00:13,733 --> 00:00:19,933

Thank you all for participating in today's event: The New RDS Secure Website Launch Webinar.

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We expect today's presentation to run for just under 30 minutes, and shortly after the event

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has concluded we'll post a link to the webinar recording and a link to the full transcript.

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Today we'll be streaming video and audio to you through Zoom, but we will not be connecting to

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your facecam or your microphone.

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So effectively, you'll be in 'listen-only mode'. On that note, please check that you have sound

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coming from the preferred speaker and the volume level is comfortable.

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00:00:47,200 --> 00:00:52,566

If you prefer to join by phone to receive audio, please dial 833-568-8864

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and enter access code 160 556 4453.

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As a reminder, this presentation is intended to be a general summary of current policy and

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operations but does not take the place of the



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statutes, regulations, or formal policy guidance provided by CMS.

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Alright, so let's take a look at our agenda today. First we're going to go over the RDS secure

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00:01:21,233 --> 00:01:25,833

website modernization project and talk about the various ways we've collaborated with

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the user community to arrive at the new RDS secure website redesign,

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00:01:29,933 --> 00:01:36,633

and then we're going to show you parts of the new redesign and highlight some of the most notable benefits for you.

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00:01:36,633 --> 00:01:43,633

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,

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00:01:43,633 --> 00:01:50,866

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.



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00:01:50,866 --> 00:01:59,266

Then we'll briefly talk about the updated resources that will be available to you once the new site goes live in early 2022,

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and lastly we'll wrap up and let you know the best way to submit any questions that you might have.

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00:02:05,600 --> 00:02:08,900

So with that, let's go ahead and dive in.

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00:02:08,900 --> 00:02:16,133

So for the last few years, CMS has been modernizing the RDS secure website with the goal of providing an intuitive,

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00:02:16,133 --> 00:02:21,433

easy-to-use, and empathetic system based on the values of our plan sponsor community

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and we also wanted to consider the needs of the vendors who support them.

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Back in 2018, we began by first announcing the modernization effort itself, and conducting our first webinar and user feedback

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session. Then in 2019, we recruited volunteers to participate in listening sessions so we could better understand the needs and wants our users.

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Then in 2020, we recruited more volunteers to participate in usability testing sessions to obtain feedback on

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our early designs that we'd been building and developing in the background.

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And then in 2021, we hosted a listening session webinar similar to this one where we walked through the annual plan

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application and payment setup processes, and then later in 2021 we conducted even more usability testing

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00:03:14,866 --> 00:03:22,366

sessions to obtain feedback on the application dashboard and reconciliation pages that had been under development.



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So in addition to all of that structured user outreach and collaboration efforts, we

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arrived at the new design by evaluating data from other angles as well, most notably

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00:03:32,566 --> 00:03:42,766

by analyzing past support tickets and email feedback from our user community to solve common problems before they happen.

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00:03:42,766 --> 00:03:48,766

We've been hard at work designing a new interface that's much more intuitive and efficient than what you're using today.

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00:03:48,766 --> 00:03:53,832

You'll notice new easier navigation and task progression for almost all the sections of the

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00:03:53,833 --> 00:03:58,899

application with fewer steps for most of these processes.

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00:03:58,900 --> 00:04:08,666

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.



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00:04:08,966 --> 00:04:15,532

We also made sure the actions on each page are visible and clear so you don't get stuck wondering "what's next?"

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We're also implementing new functionality that will help you complete your work faster, so some examples of those efficiencies are

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00:04:23,566 --> 00:04:30,566

like I mentioned, streamlining the steps for the application submission, for the payment setup and reconciliation processes,

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00:04:30,566 --> 00:04:35,232

so this means there will be fewer steps to some of those major tasks

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00:04:35,233 --> 00:04:43,733

and, where appropriate, we've combined steps to group like-items and keep the flow of your work more seamless,



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and cluster things so that they live on the page you expect them to be on.

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We've also eliminated most of the redundant confirmation and verification screens, so instead of making you click 'yes' three times, we

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00:04:58,566 --> 00:05:04,132

now believe you when you take an action in the app, so we think that will be a benefit as well,

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00:05:04,133 --> 00:05:09,733

as we've heard from our user community that that was a hardship in the past.

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00:05:09,733 --> 00:05:17,566

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,

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all RDS applications' payment frequency now defaults to monthly

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instead of quarterly or annually. So this means that you can submit up to 12 interim payment requests per plan year





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This was announced back on May 8, 2020,

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so go ahead and refer back to the announcement on that date on payment frequency to read the policy in detail.

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00:05:43,500 --> 00:05:50,333

Something that is new coming up: regardless of the retiree list submission method that you've chosen for your benefit

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option, the secure website will always be copied on response files.

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00:05:54,900 --> 00:06:03,400

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

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00:06:03,400 --> 00:06:09,100

new default for the program now, you don't have to change any settings or do anything.



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00:06:09,100 --> 00:06:13,900

And for all you Authorized Representatives on the call, you'll be pleased to see that you won't need

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00:06:13,900 --> 00:06:18,700

to enter your security question responses to submit an application anymore.

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00:06:18,700 --> 00:06:24,900

As long as you're logged in using your 2-factor authentication, the security question responses are no longer a security

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00:06:24,900 --> 00:06:29,066

requirement needed to validate that you are who you say you are.

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00:06:29,066 --> 00:06:33,966

So hopefully that will save you some headache and heartache as well.

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00:06:33,966 --> 00:06:42,566

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

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00:06:42,566 --> 00:06:49,266



on the page, so our hope here is to guide you to a helpful response to get you quickly back on track based on

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00:06:49,266 --> 00:06:54,066

where you're at in the process and what has worked for other users.

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00:06:55,133 --> 00:07:03,766

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

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00:07:03,766 --> 00:07:12,432

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

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00:07:12,433 --> 00:07:18,233

and their privileges from all the applications that they are listed on.

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00:07:18,233 --> 00:07:26,433

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

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your company, feel free to update your application names so that they hold the most meaning to you.

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00:07:33,733 --> 00:07:39,399

Additionally we've made it even quicker and easier to get that application deadline extension taken care of,

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the link is now situated right next to the application deadline in the summary section

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00:07:45,333 --> 00:07:53,333

We've also included more summary information throughout the secure website to help you see relevant data at a glance,

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00:07:53,333 --> 00:08:01,566

so specifically we have Plan Sponsor and Team sections on the application overview page with all the pertinent players on the application

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00:08:01,566 --> 00:08:02,066



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00:08:02,066 --> 00:08:09,766

dates to be mindful of, and the status of commonly-tracked items like attestation and the initial retiree list.

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00:08:09,766 --> 00:08:16,099

We have similar information under Manage Retirees and Reconciliation.

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00:08:17,000 --> 00:08:22,000

When creating applications under the same Plan Sponsor, you'll have all

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00:08:22,000 --> 00:08:27,066

previously-used banking information listed and available to choose from

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00:08:27,066 --> 00:08:31,732

so it will appear in a list, any different accounts that have been used on this Plan Sponsor,

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00:08:31,733 --> 00:08:36,399

and you won't have to re-type all the banking information from scratch.



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00:08:36,400 --> 00:08:37,333

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00:08:37,333 --> 00:08:43,033

Likewise, all previously-used Designee names will be available in a drop down

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00:08:43,033 --> 00:08:50,999

so you can quickly recognize who to add to the new annual application and set their privileges accordingly.

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00:08:51,566 --> 00:08:59,399

We've also added a visual mapping to help you see which cost reporters you've assigned to each benefit option so,

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00:08:59,400 --> 00:09:04,666

we expect this will especially be beneficial to those of you who have lots of benefit options

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00:09:04,666 --> 00:09:15,799

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.

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00:09:15,800 --> 00:09:23,000

Lastly but not least, we are also introducing a copy application function.

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00:09:23,000 --> 00:09:30,200

This will allow you to easily reuse a previous year's application as a base for this year's application.

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00:09:30,200 --> 00:09:36,500

It let's you pull over all the previous plan sponsor information, it auto-fills in your

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00:09:36,500 --> 00:09:40,966

plan start and end dates based on last year's start and end dates,

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00:09:40,966 --> 00:09:49,932

it pulls in the banking information, the actuary, the benefit option configurations, and it remembers those designees as well

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00:09:49,933 --> 00:09:58,866

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.

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00:09:58,866 --> 00:10:06,299

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



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00:10:06,300 --> 00:10:11,266

over year -- that data will be pulled in automatically for you.

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00:10:11,266 --> 00:10:18,266

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

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00:10:18,266 --> 00:10:24,366

identically year over year. Some of you printed out the application information and re-typed it,

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00:10:24,366 --> 00:10:31,199

and some of you kept your own Master File, like a master file of record, and used that as a base to create each

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00:10:31,200 --> 00:10:35,833

application every year, so thank you for sharing your stories and hanging in there,

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00:10:35,833 --> 00:10:41,533

we don't think you should have to work that hard either, so finally this hardship is going away in 2022

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00:10:41,533 --> 00:10:48,533

and we couldn't be more excited to deliver that to you.





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00:10:48,533 --> 00:10:56,933

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.

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00:10:56,933 --> 00:11:05,333

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

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00:11:05,333 --> 00:11:13,766

applications in here right now but as I scroll through here real quick, just note that we have several different plan sponsors

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00:11:13,766 --> 00:11:18,432

that I'm highlighting right now, we have 3 different plan sponsors here, so you can sort

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00:11:18,433 --> 00:11:23,099

any of the columns as you wish to help you find what you're looking for more quickly,

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00:11:23,100 --> 00:11:31,600

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

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00:11:31,600 --> 00:11:38,433



down somewhere, what status it's in, there are several statuses that your application will move through throughout the process,

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00:11:38,433 --> 00:11:42,933

You can also sort by your start and end date of your plan year,

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00:11:42,933 --> 00:11:48,666

as you get further down and have interim payments, you can sort by total paid to date,

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00:11:48,666 --> 00:11:54,399

that can be helpful as well, as well as the application deadline and reconciliation deadline.

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00:11:54,400 --> 00:11:55,166

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00:11:55,166 --> 00:12:01,932

We have some tabs up here. You'll notice 'in progress' which is going to show you all of your active applications,

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00:12:01,933 --> 00:12:02,199

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00:12:02,200 --> 00:12:09,833

we also have a section called 'Completed' which is going to display only those applications who have completed reconciliation.



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00:12:09,833 --> 00:12:16,399

And we also have a third section called 'Archived'. The Archived section is going to show applications that have been

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00:12:16,400 --> 00:12:23,000

withdrawn, deleted, denied, or that have missed their Reconciliation deadline.

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00:12:23,000 --> 00:12:23,433

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00:12:23,433 --> 00:12:27,999

Alright, so for us to review some of the major functional areas of the secure website,

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00:12:28,000 --> 00:12:31,233

we're going to pop into 1 or 2 of these test applications and

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00:12:31,233 --> 00:12:40,366

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

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00:12:40,366 --> 00:12:49,532

in reconciliation, the cost reporting actually is closed, I'm looking here at the application status -- it says "reconciliation cost reporting closed" right here



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00:12:49,533 --> 00:12:58,499

but it does still show you all that pertinent information: your plan sponsor ID and name, account manager, authorized representative,

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00:12:58,500 --> 00:13:02,733

the application name, the plan dates,

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00:13:02,733 --> 00:13:08,099

the app ID, application deadline, reconciliation deadline

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00:13:08,100 --> 00:13:12,900

various other things like the fact that it's been attested, obviously since it's in reconciliation.

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00:13:12,900 --> 00:13:20,600

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

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00:13:20,600 --> 00:13:25,733

show you who's on your team, who's working on this application with you.

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00:13:25,733 --> 00:13:30,899

In this case, we just have the account manager and one designee as well as the actuary but



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00:13:30,900 --> 00:13:34,833

this list can grow depending on your business needs.

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00:13:34,833 --> 00:13:44,266

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

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00:13:44,266 --> 00:13:50,566

edit mode just to show you what this would look like if we were entering them for the first time.

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00:13:50,566 --> 00:13:56,799

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

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00:13:56,800 --> 00:14:01,766

which cannot be changed, which is why we are unable to edit it at this time.

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00:14:01,766 --> 00:14:09,666

You can select the type, it's either Self Funded or Fully Insured just like today, and the Retiree Submission Method, likewise,

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00:14:09,666 --> 00:14:17,566



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

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00:14:17,566 --> 00:14:25,499

while you're in the application building phase of your application, you can build these benefit options to match exactly what your needs are.

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00:14:25,500 --> 00:14:27,966

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00:14:27,966 --> 00:14:36,632

Just to show you here, this is the actuary page. We assigned our actuary and then, after processing the submission of the application,

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00:14:36,633 --> 00:14:45,299

they went in and attested that each benefit option meets the regulations and requirements

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00:14:45,300 --> 00:14:46,833

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00:14:46,833 --> 00:14:50,866

So this is more of an informational page at this stage in the application.

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00:14:50,866 --> 00:14:59,466

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



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00:14:59,466 --> 00:15:08,099

at anytime 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.

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00:15:08,100 --> 00:15:14,933

And then we can view here this Review and Submit page, so back when you're creating your initial application, this page would unlock

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00:15:14,933 --> 00:15:21,799

after all the benefit options are put forth and after the actuary has done their attestation and everything's correct,

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00:15:21,800 --> 00:15:32,200

this page would come forward for the Authorized Representative to a push through the actual application itself.

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00:15:32,200 --> 00:15:37,800

But everyone can view it as a summary page, so that's why this is here.

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00:15:37,800 --> 00:15:43,000

Alright, let's skip down to Manage Designees. So obviously this has been done before since this application is

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00:15:43,000 --> 00:15:48,200

pretty far along, but what we can see here is that we have 1 designee,

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00:15:48,200 --> 00:15:53,566

and that just happens to be the only designee. If we needed to add new designees, we just

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00:15:53,566 --> 00:16:01,099

add a new designee, put in their e-mail and search, and we can add them to the application.

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00:16:01,100 --> 00:16:09,400

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,

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00:16:09,400 --> 00:16:14,033

and most of the Manage Retirees section functionality hasn't changed all that much

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00:16:14,033 --> 00:16:18,666

we did try to consolidate some pages and have some information

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00:16:18,666 --> 00:16:26,499

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

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00:16:26,500 --> 00:16:34,333

including the application ID, the plan name, what the status of the application is, and what the application deadline is,

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00:16:34,333 --> 00:16:38,699

which we include here so that the plan sponsors know when they need to submit that

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00:16:38,700 --> 00:16:43,066

Initial Retiree List by, so we're reiterating that here for that reason.

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00:16:43,066 --> 00:16:44,432

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00:16:44,433 --> 00:16:53,266

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

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00:16:53,266 --> 00:17:02,132

Retiree Counts by Benefit Option table, which summarizes all the information here for each of our benefit options, how many unique

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00:17:02,133 --> 00:17:08,066

retiree counts per benefit option, etc. You can also click in and view the monthly

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00:17:08,066 --> 00:17:13,132

retiree counts, so as those numbers go up and down month by month based on the file

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00:17:13,133 --> 00:17:18,233

that's been submitted, this table summarizes the information for you here.

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00:17:18,233 --> 00:17:20,099

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00:17:20,100 --> 00:17:27,133

So what we're going to do now is click on this Retiree and Response Files section

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00:17:27,133 --> 00:17:30,166

and this is where you're going to upload your retiree file.

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00:17:30,166 --> 00:17:38,966

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

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00:17:38,966 --> 00:17:44,866

previously uploaded their file, which we can see here on the Uploaded Retiree Files table.

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00:17:44,866 --> 00:17:45,232



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00:17:45,233 --> 00:17:54,233

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.

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00:17:54,233 --> 00:18:01,266

One of the other enhancements that we've made to the secure website is around the Covered Retiree List, so we've combined

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00:18:01,266 --> 00:18:06,766

multiple pages together so that the place where you request your covered retiree list and the place where

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00:18:06,766 --> 00:18:10,699

you download your covered retiree list are in the page.

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00:18:10,700 --> 00:18:15,500

So you can see here that back in August, this application

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00:18:15,500 --> 00:18:23,100

requested their cover retiree list and it's located right here. It's available for download as a link.

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00:18:23,100 --> 00:18:31,133

Now, if this application status were not in reconciliation, we could use this request covered retiree list



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00:18:31,133 --> 00:18:36,499

button here, which now is grayed out but if we were earlier in the process this button would not be grayed out,

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00:18:36,500 --> 00:18:43,533

we could request it, and then a new file would be generated with a new link above this one.

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00:18:43,533 --> 00:18:45,299

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00:18:45,300 --> 00:18:50,233

Not a lot of changes at all to the weekly notification files section,

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00:18:50,233 --> 00:18:58,266

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

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00:18:58,266 --> 00:19:03,632

Rejection Notification section. This is just where they're located.

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00:19:03,633 --> 00:19:07,199

So let's go ahead and move on to Payment Setup.

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00:19:07,200 --> 00:19:17,000

so 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

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00:19:17,000 --> 00:19:21,900

so this is where you're going to select the permissions or privileges for your account manager.

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00:19:21,900 --> 00:19:29,133

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?

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00:19:29,133 --> 00:19:36,399

Whatever best meets your business needs, in this case we've chosen to be a cost reporter as the account manager.

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00:19:36,400 --> 00:19:36,833

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00:19:36,833 --> 00:19:43,066

Scrolling down, we see the Benefit Option and Cost Reporter Summary section, so this just states

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00:19:43,066 --> 00:19:46,732

your Benefit Options by name and UBOI, and

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00:19:46,733 --> 00:19:55,166

lists who the cost reporters are for each of those benefit options. Right now, it's just showing us as the account manager.

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00:19:55,166 --> 00:19:57,632

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00:19:57,633 --> 00:20:04,133

Returning to our left navigation menu, let's go ahead and click on the Payment Requesters section.

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00:20:04,133 --> 00:20:05,699

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00:20:05,700 --> 00:20:12,866

This page is going to show us the Plan Sponsor Payment Requesters. The Authorized Representative is always a payment requester,

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00:20:12,866 --> 00:20:20,066

and can never report costs, so obviously the Authorized Representative is listed as a payment requester on this table.

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00:20:20,066 --> 00:20:26,299

This application also has a designee listed as a payment requester.

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Now let's go ahead and click on Identify Cost Reporters.

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00:20:29,800 --> 00:20:34,933

As I mentioned earlier, the account manager elected to be a cost reporter in the previous screen,

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so therefore, the account manager is listed here as a plan sponsor cost reporter.

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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

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00:20:48,700 --> 00:20:56,333

vendor to your application. You simply click the 'Add Vendor' button, you type in their vendor ID, and click

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00:20:56,333 --> 00:21:01,466

search to find that vendor, and then you can add that vendor to your application.

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00:21:01,466 --> 00:21:03,766



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So now let's move on to the Assign Cost Reporters to Benefit Options section. We looked at this briefly earlier in the webinar.

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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

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00:21:19,166 --> 00:21:24,332

whether it be various designees or vendor designees, this table will show

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00:21:24,333 --> 00:21:29,499

which individuals have cost reporter privileges for each benefit option on your application.

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So right now, this happens to be a very simple table because we only have one cost reporter and two benefit options, but

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00:21:36,133 --> 00:21:40,566

many of you may have more complicated applications than this example here

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00:21:40,566 --> 00:21:40,766





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where you may have two or three or four different cost reporters, and multiple different benefit options,

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00:21:46,733 --> 00:21:52,833

so we believe that this matrix can be helpful to keep that data clear in your mind as to

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00:21:52,833 --> 00:21:58,966

who's doing what and who has what privilege for which benefit option.

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00:21:58,966 --> 00:21:59,099

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00:21:59,100 --> 00:22:03,700

And of course to support all these enhancements, we'll be publishing a fully-updated

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00:22:03,700 --> 00:22:08,300

User Guide, Common Questions, and other educational support materials.

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00:22:08,300 --> 00:22:08,366

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Any future materials will be developed as-needed to help create a smooth transition as the user community becomes fluent in the new secure

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00:22:16,100 --> 00:22:21,300

website, so please let us know what you need and how we can better support you.

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00:22:23,666 --> 00:22:31,032

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

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00:22:31,033 --> 00:22:38,399

to progress this effort and make sure that your needs are heard and reflected in this new redesign.

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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

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expect for some of these major functional areas. And we talked about the different resources

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that are going to be updated to help support you in this transition.

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00:22:57,833 --> 00:23:05,933

Just as a quick caveat, the project is still underway and the new secure website should be live in early 2022, so some of the screens

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00:23:05,933 --> 00:23:11,366

shown today may change slightly by that time depending on ongoing development activities.

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00:23:11,366 --> 00:23:14,132

If you have any questions about what we've gone over today,

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00:23:14,133 --> 00:23:22,099

or any questions in general about the secure website modernization project, please submit a support request or send us an e-mail at

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00:23:22,100 --> 00:23:30,066

RDS@cms.hhs.gov. And as always, please do not include any PHI or PII in any correspondence with

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00:23:30,066 --> 00:23:32,766

CMS' RDS Center.

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00:23:32,766 --> 00:23:40,099



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 please

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watch your inbox for a future announcement on when the new secure website will be going live. We hope to be able to make that announcement soon.

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00:23:47,433 --> 00:23:52,366

so thanks again for joining us and have a great day.