RDS Webinar Listening Session
June 23, 2021
2:00 PM - 3:30 PM EST

RDS Secure Website Modernization

Annual Plan Application & Payment Setup
Demonstration and Listening Session

The information provided in this presentation is intended only as a general informal summary. It is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. This presentation summarizes current policy and operations as of the date it was presented. We encourage audience members to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information about the requirements that apply to them.

RDS Secure Website Modernization Webinar and Feedback Session

June 23, 2021

- You can listen to the event using your computer speakers or headphones. Please ensure your computer speakers are not muted and the volume is turned up.

- As an alternative, you can listen using your phone by dialing (833) 568-8864 and entering access code: 160 993 3042.

- Remember to turn off your pop-up blockers so you can participate in our feedback opportunities. Participants will answer poll questions throughout the presentation.

Agenda

- RDS Secure Website Modernization
- Introduction to the Enhanced Design
- Annual Plan Application Submission Demonstration
  - Application Submission
  - Designee Management
  - Retiree Management
- Payment Setup Demonstration
- Polling Questions
- Summary

RDS Secure Website Modernization

- CMS' RDS Center is modernizing the RDS Secure Website interface with the goal of designing an intuitive, easy to use, empathic system based on Plan Sponsor values, while also considering the needs of the Vendors who support many of them.

- In 2018, CMS' RDS Center first announced the Secure Website Modernization project and conducted our first Webinar and feedback session.

- In 2019, CMS' RDS Center recruited volunteers to participate in Listening Sessions to better understand the needs and wants of our users.

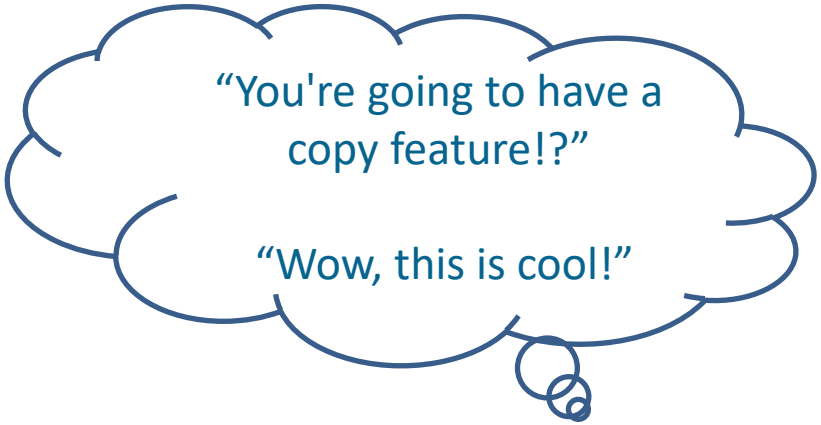
- In 2020, CMS' RDS Center recruited volunteers to participate in Usability Testing Sessions to obtain feedback on our early designs.
  - During the presentation, you'll see thought bubbles containing direct feedback from our Plan Sponsor & Vendor community captured during those sessions.

- 2021: Listening Session Demo & Additional User Events

RDS Secure Website Modernization

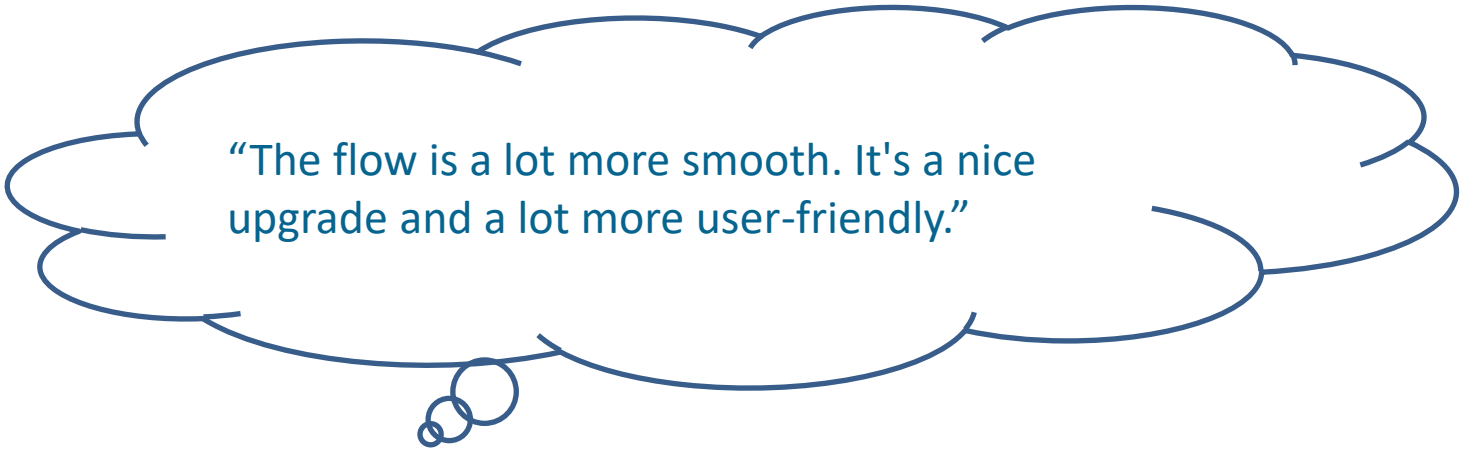
- The modernized Secure Website will have:
  - New intuitive design
  - Modified screen flows for all sections of the application
  - Fewer number of steps for most processes
  - New and improved functionality
    - Streamlined Application Submission Process, Payment Setup, and Reconciliation flows
    - Fewer Confirmation and Verification screens
    - Updated Page Messaging
    - Copy a previous year application

- Updated educational materials including User Guide documentation and other support materials.



RDS Secure Website Modernization

- The project has an estimated implementation in early 2022.
- The RDS Secure Website Modernization project is still underway. The screens and flows you see today may change slightly based on user feedback and continuing development activities.
- Today we'll be demonstrating new Secure Website pages and flows and asking polling questions throughout the presentation. Your feedback will help us design a website that gives you the best user experience possible!



Introduction Polling Questions

Please respond to these two questions about your role in the RDS Secure Website.

Question 1

My current RDS Secure Website user role is…

1. Authorized Representative (AR)
2. Account Manager (AM) – PLAN SPONSOR
3. Account Manager (AM) – VENDOR
4. Designee – PLAN SPONSOR
5. Designee – VENDOR
6. Actuary
7. I am not a registered Secure Website user

Question 2

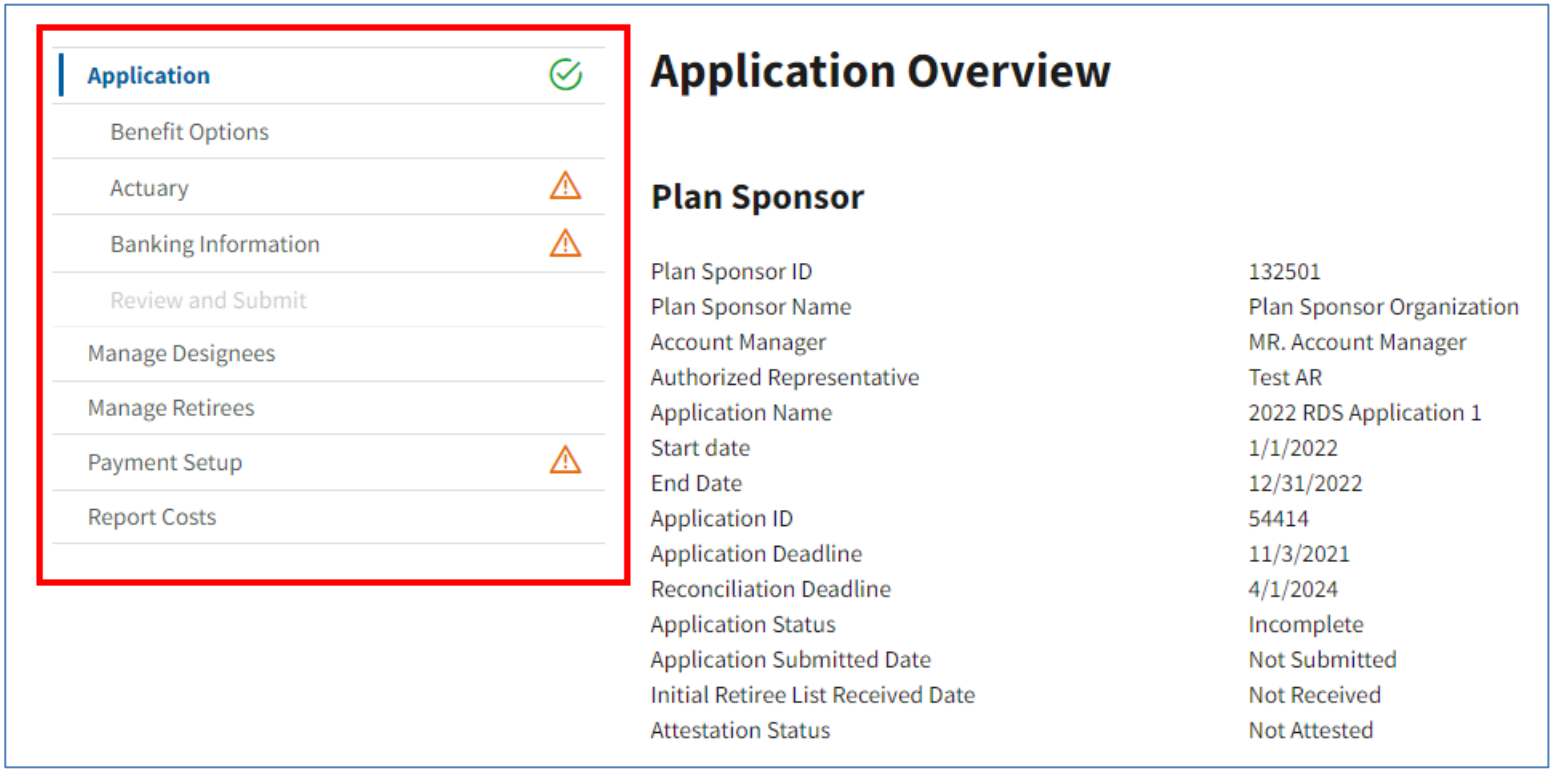
I am relatively familiar with the following RDS processes…

1. Creating an Application
2. Managing Designees
3. Managing Retirees
4. Completing Payment Setup
5. None of the above

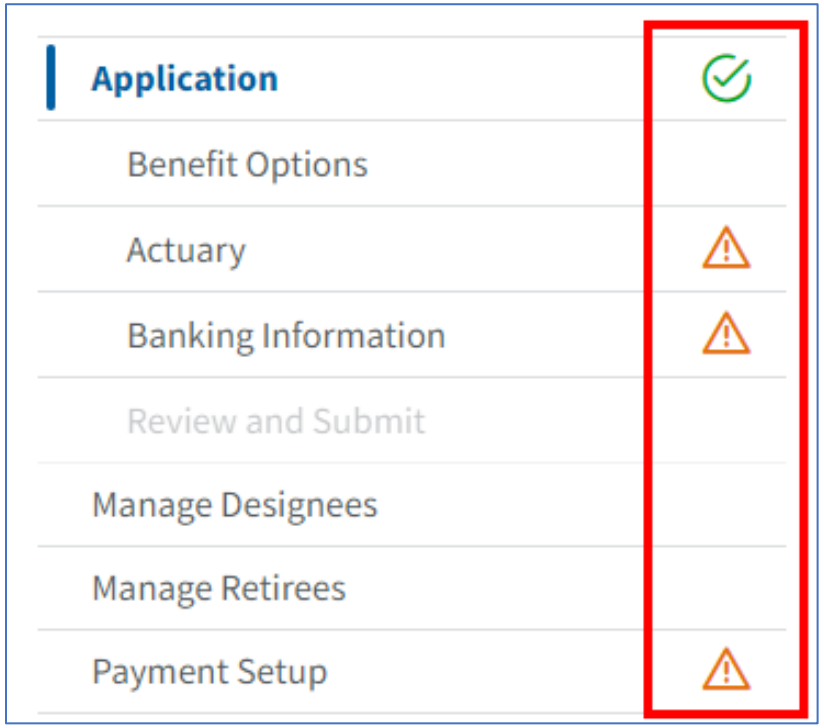
Navigation Enhancements

Left Navigation Menu is the primary navigation control throughout the application plan year.

"Navigation was pretty intuitive."



Navigation Enhancements

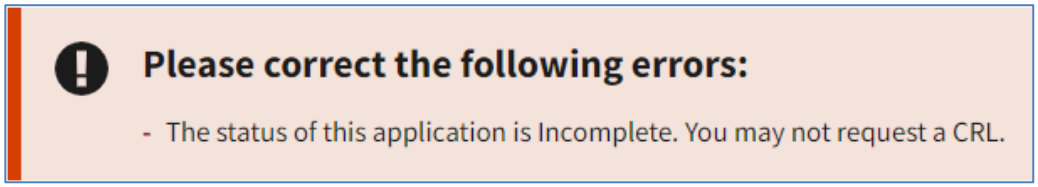


"I love the checkmarks. That's a very clear visual for people...That's very helpful for a user."

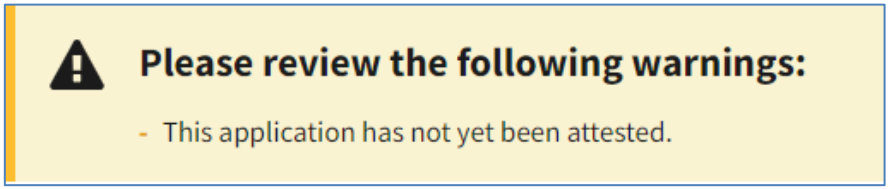
	No Indicator	• Section not started • No feedback to provide
	Green Circle Check Mark	• Section complete • No errors or warnings identified
	Red Triangle Exclamation Point	• Section incomplete • Errors or warnings identified

Messaging Enhancements

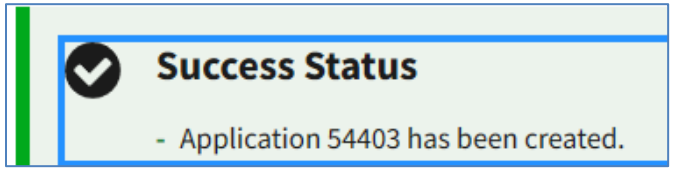
Errors



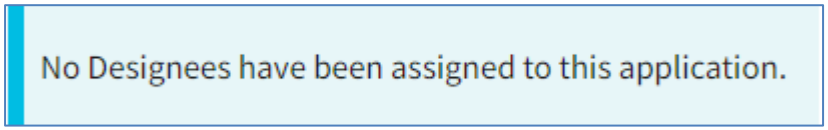
Warnings



Success Messages



Informational Messages



Create New Application Demonstration

Demo: Create Application & Banking Information

Polling Questions

Please respond to these two questions about the new Secure Website that you've seen so far.

Question 3

I think the process to start a new Application is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 4

I think the process to manage Banking Information is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Create New Application Demonstration

Demo: Benefit Options & Actuary

Polling Questions

Please respond to these two questions about the new Application Submission Process.

Question 5

I think the process to manage Benefit Options is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 6

I think the process to manage the Actuary is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Create New Application Demonstration

Demo: Manage Retirees & Review and Submit

Polling Questions

Please respond to these two additional questions about the new Application Submission Process.

Question 7

I think the process to manage Retirees is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 8

I think the process to submit the Application is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Create New Application Demonstration

Demo: Copy Application & Manage Designees

Polling Questions

Please respond to these two questions about the new Copy feature.

Question 9

I think the process to copy a previous year's application is simple and intuitive.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 10

I could teach someone to use the Copy feature relatively quickly.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to these two additional questions about the new Secure Website.

Question 11

I am looking forward to using the new Copy feature.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 12

I think the process to manage Designees is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to this question about the new Application Submission Process in general.

Question 13

I think it would be easy submitting applications in the new Secure Website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 14

I think it would be faster submitting applications in the new Secure Website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Payment Setup Demonstration

Demo: Payment Setup

Polling Questions

Please respond to this question about the new Payment Setup Process.

Question 15

I think the new Payment Setup is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 16

I think the process to manage Designee Cost Reporters is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to this question about the new Payment Setup Process.

Question 17

I think the process to manage Vendor Cost Reporters is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 18

I think the process to manage Benefit Option-Cost Reporter assignments is an improvement over the current website.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to this question about the new Payment Setup Process.

Question 19

I think it would be easy to complete Payment Setup this way.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 20

I think it would be faster to complete Payment Setup this way.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to these questions about the RDS support materials.

Question 21

I use/have used the RDS Welcome Kit and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 22

I use/have used the RDS Job Aids and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to these questions about the RDS support materials.

Question 23

I use/have used RDS TV training videos and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 24

I use/have used the RDS Reconciliation Toolkit and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to these questions about the RDS support materials.

Question 25

I use/have used the RDS Quick Start Guides and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 26

I use/have used the RDS Technical Articles and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to these questions about the RDS support materials.

Question 27

I use/have used the RDS Common Questions and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 28

I use/have used the RDS User Guide and this feature is/was important to my understanding of the RDS Program.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Polling Questions

Please respond to these questions about today's presentation.

Question 29

I thought today's session was a good use of my time.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Question 30

I would attend future sessions on other RDS topics if they are offered.

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly Disagree
6. I don't know/not applicable to me

Final Thoughts

- ✓ RDS Secure Website Modernization
- ✓ Introduction to the Enhanced Design
- ✓ Annual Plan Application Submission Demonstration
  - ✓ Application Submission
  - ✓ Designee Management
  - ✓ Retiree Management
- ✓ Payment Setup Demonstration
- ✓ Polling Questions
- ✓ Summary

Questions

Submit a Support Request

To submit a Support Request, log into the RDS Secure Website and select "Request Support" in the navigation menu.

Send an Email

CMS' RDS Center Email Address: RDS@cms.hhs.gov

Do not include any Protected Health Information (PHI), as defined in the Health Insurance Portability and Accountability Act (HIPAA), or Personally Identifiable Information (PII) in the inquiry.

Questions

Thank you for your participation in the RDS Program!