



Secure Website Modernization Map: Annual Plan Application Process

A primary goal of the [RDS Secure Website Modernization](#) is simplifying the key processes used by the RDS community to participate in the program. Wherever possible, CMS' RDS Center has streamlined processes by redesigning Secure Website pages, combining related steps, removing redundant steps, and renaming steps to make them more intuitive.

To help new and experienced Secure Website users alike transition to these modernized processes, CMS' RDS Center created matrices that map the old process steps to the new process steps. This document provides a matrix for the [Annual Plan Application](#) process.

Table 1: Annual Plan Application Step Matrix

The old process step...	Is replaced by the new process step...	This step is completed by...
Complete Step 1: Application Number Assigned	Create Application	Account Manager Authorized Representative
Complete Step 2: Benefit Option	Benefit Options	Account Manager Authorized Representative Designee(s) with the <i>Define Benefit Options</i> privilege
Complete Step 3: Assign Actuary: Assign One Actuary to All Benefit Options	Actuary Step-by-Step Instructions: Assign Actuary	Account Manager Authorized Representative Designee(s) with the <i>Assign Actuary</i> privilege
Complete Step 3: Assign Actuary: Assign Multiple Actuaries	The function to assign multiple Actuaries to a single application has been removed from the RDS Secure Website.	N/A

The old process step...	Is replaced by the new process step...	This step is completed by...
Attest Actuarial Equivalence	Attest Actuarial Equivalence	Actuary
View Step 4: Attestation Summary	Actuary Step-by-Step Instructions: View Attestation	Account Manager Authorized Representative Designee(s) with the <i>View Attestation Summary</i> privilege
Complete Step 5: Electronic Funds Transfer (EFT) Information	Banking Information	Account Manager Authorized Representative Designee(s) with the <i>Complete Electronic Funds Transfer (EFT) Information</i> privilege
Complete Step 6: Payment Frequency	The function to select a Payment Frequency for an application has been removed from the RDS Secure Website. All current and future RDS applications' have a maximum frequency of monthly interim payments, consistent with the general payment rules regarding timing set forth in 42 C.F.R. 423.888(b)(1). Although 12 interim payment requests are permitted, a Plan Sponsor may choose to submit fewer than 12 interim payment requests, or forego interim payments and instead choose to submit one final payment request during Reconciliation as described in 42 C.F.R. 423.888(b)(2)(ii).	N/A

The old process step...	Is replaced by the new process step...	This step is completed by...
Complete Step 7: Retiree Electronic Data Interchange (EDI) Methods and Sources	Benefit Options	Account Manager Authorized Representative Designee(s) with the <i>Define Benefit Options</i> privilege
Complete Step 8: Plan Sponsor Agreement	Review & Submit Application	Authorized Representative
Complete Step 9: Valid Initial Retiree List	Valid Initial Retiree List	Account Manager Authorized Representative Designee(s) with the <i>View/Send/Receive Retiree Data</i> privilege Vendors
Make Changes to an Application After Submission	Make Changes to an Application After Submission	Account Manager Authorized Representative Designee(s) granted the appropriate privilege
Request an Application Deadline Extension	Request an Application Deadline Extension	Account Manager Authorized Representative Designee(s) with the <i>Request Extension</i> privilege



The old process step...	Is replaced by the new process step...	This step is completed by...
Delete an Application	Delete an Application	Account Manager Authorized Representative Designee(s) granted the appropriate privilege