



Secure Website Modernization Map: Reconciliation

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 page provides a matrix for [Reconciliation](#).

Table 1: Reconciliation Step Matrix

The old process step...	Is replaced by the new process step...	This step is completed by...
Reconciliation Checklist	The Reconciliation Checklist has been removed from the RDS Secure Website as a standalone application page. All Reconciliation steps are now accessed through the Left Navigation menu by selecting and expanding the Reconciliation link.	N/A
Step 1: Initiate Reconciliation	Initiate Reconciliation	Account Manager Authorized Representative
Step 2: Review Payment Setup	This step has been removed from the RDS Secure Website. Plan Sponsors are no longer required to proactively review and approve Payment Setup for each application during Reconciliation . A link to access Payment Setup is present on the Reconciliation homepage and in the Left Navigation section of all applications.	N/A

The old process step...	Is replaced by the new process step...	This step is completed by...
Step 3: Request List of Covered Retirees	Finalize Covered Retirees	Authorized Representative Account Manager Designee(s) with the <i>Request Payment</i> privilege
Step 4: Finalize Covered Retirees	Finalize Covered Retirees	Authorized Representative Account Manager Designee(s) with the <i>Request Payment</i> privilege
Step 5: Start Preparation of Reconciliation Payment Request	This step has been removed from the RDS Secure Website.	N/A
Step 6: Manage Submission of Final Cost Reports	Manage Final Costs	Account Manager Designee(s) with the <i>Request Payment</i> privilege
Step 7: Review Final Costs	Review Final Costs	Account Manager Designee(s) with the <i>Request Payment</i> privilege
Step 8: Enter Revisions to Final Costs	This step has been removed from the RDS Secure Website. However, Plan Sponsors can still enter revisions to Final Costs during Reconciliation using Manage Final Costs .	N/A

The old process step...	Is replaced by the new process step...	This step is completed by...
Step 9: Finalize Reconciliation Payment	Review Final Payment Request	Account Manager Designee(s) with the <i>Request Payment</i> privilege
Step 10: Review Electronic Funds Transfer (EFT) Information	Banking Information	Account Manager Authorized Representative Designee(s) with both the <i>Complete Banking Information</i> and the <i>Request Payment</i> privileges
Step 11: Approve Electronic Funds Transfer (EFT) Information	This step has been removed from the RDS Secure Website. However, Plan Sponsors must still approve the application's Banking Information during Reconciliation by completing Review And Submit Reconciliation Payment Request .	N/A
Step 12: Review And Submit Reconciliation Payment Request	Review And Submit Reconciliation Payment Request	Authorized Representative