



# **Actuary Registration and Attestation Teleconference**

**Presented by: Jennifer Craft  
July 23, 2009**

# Objectives



- In this session participants will become familiar with:
  - The additions to the Actuary Registration Process
  - The streamlined Actuary Assignment Process
  - The changes to the Actuary Attestation Process
  - The Multiple Role Conflict and steps to resolution

# Actuary Registration Process

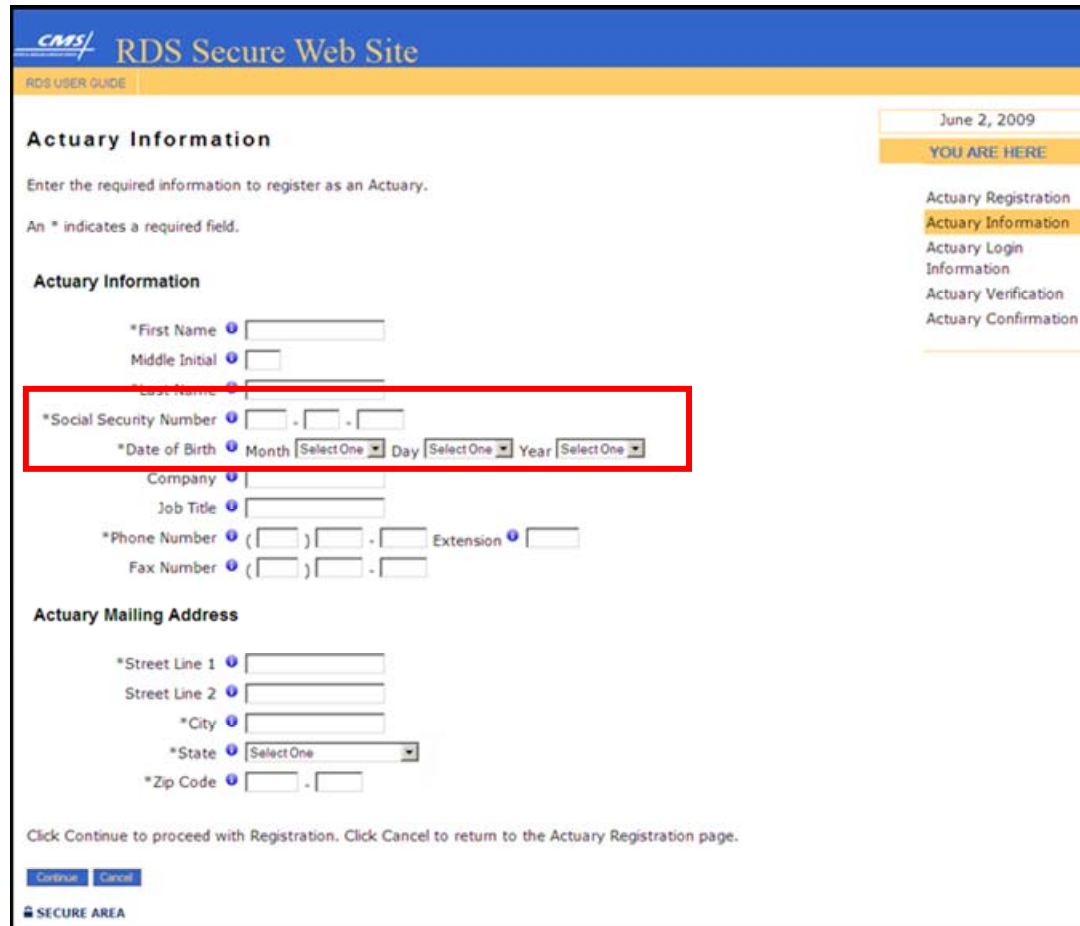
# Current Registration



- Each individual registers for one role in the RDS Secure Website
- Actuaries currently register with the following information:
  - Name
  - Address
  - American Academy of Actuaries Membership Number

# New Registration Process

- Addition of Social Security Number and Date of Birth fields



**Actuary Information**

Enter the required information to register as an Actuary.

An \* indicates a required field.

**Actuary Information**

\*First Name

Middle Initial

Last Name

\*Social Security Number  -  -

\*Date of Birth Month  Day  Year

Company

Job Title

\*Phone Number (  )  -  Extension

Fax Number (  )  -

**Actuary Mailing Address**

\*Street Line 1

Street Line 2

\*City

\*State

\*Zip Code  -

Click Continue to proceed with Registration. Click Cancel to return to the Actuary Registration page.

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# New Registration Process



- The new fields will assist CMS' RDS Center with the RDS Secure Website user validation process
- The addition of these fields also ensures that each individual holds only one role within the RDS Secure Website
- All Actuaries are required to complete the new registration process


# Actuary Re-registration



- **In the beginning of August**, CMS' RDS Center will inactivate all Actuary user accounts
- Actuaries will receive an Actuary Invitation email inviting them to re-register in the RDS Secure Website
- All Actuaries need to complete registration immediately to allow time for processing
- Complete re-registration as soon as possible to assist the Plan Sponsor with meeting **Application Deadlines**

# Actuary Registration page

- The link provided in the Actuary Invitation email goes to the Actuary Registration page

 [Print this page](#)

July 10, 2009

**YOU ARE HERE**

1. **Actuary Registration**
2. Actuary Information
3. Actuary Login Information
4. Actuary Verification
5. Actuary Confirmation

## Actuary Registration

You have been assigned as an Actuary for the following Application:

**Plan Sponsor ID:** 55555  
**Plan Sponsor Name:** 1st Company of America  
**Application ID:** 12345  
**Plan Name:** First Gold

To access the RDS Secure Website, you must create an Actuary Login ID. Enter your American Academy of Actuaries Membership Number to begin the process.

An \* indicates a required field.

\*American Academy of Actuaries Membership Number

[View and print the User Agreement](#)

### User Agreement and Privacy Policy

THE FOLLOWING DESCRIBES THE TERMS AND CONDITIONS ON WHICH THE CENTERS FOR MEDICARE & MEDICAID SERVICES (CMS) OFFERS YOU ACCESS TO CMS' RDS CENTER'S SECURE WEB SITE.

You must read and accept the terms and conditions contained in this User Agreement expressly set out below and incorporated by reference

\*Click the checkbox to confirm that you have reviewed and agree to the User Agreement.

Click Continue to proceed with Registration. Click Cancel to exit this process.

# Actuary Registration page

- One of the Actuary's various Applications will be randomly selected for re-registration

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Click Continue to proceed with Registration. Click Cancel to exit this process.

# Actuary Registration page

- After completing re-registration, the Actuary will be automatically assigned all of their previous Applications

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Click Continue to proceed with Registration. Click Cancel to exit this process.

# Actuary Information page

- On the Actuary Information page, the Actuary will enter their information and mailing address

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YOU ARE HERE

### Actuary Information

Enter the required information to register as an Actuary.  
An \* indicates a required field.

#### Actuary Information

\*First Name   
Middle Initial   
\*Last Name   
\*Social Security Number  -  -   
\*Date of Birth Month  Day  Year   
Company   
Job Title   
\*Phone Number (  )  -  Extension   
Fax Number (  )  -

#### Actuary Mailing Address

\*Street Line 1   
Street Line 2   
\*City   
\*State   
\*Zip Code  -

1. Actuary Registration
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Click Continue to proceed with Registration. Click Cancel to return to the Actuary Registration page.

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# Login ID & Password



- An Actuary can select an entirely new Login ID and Password or keep their previous Login ID and Password when re-registering
- The Security Questions must be selected and Answers must be provided
- The new Security Questions and Answers can be the same or different than the previous Security Questions and Answers

# Actuary Login Information page

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**YOU ARE HERE**

1. Actuary Registration
2. Actuary Information
3. **Actuary Login Information**
4. Actuary Verification
5. Actuary Confirmation

## Actuary Login Information

### Login ID and Password

Create your Login ID and Password based on these requirements:

- Login ID must be 8 to 15 characters
- Login ID and Password cannot be the same
- Password must be 8 characters in length
- Password must be a combination of letters and numbers
- Password must be lower case only (do not use mixed case)
- Password must be different from the last 6 passwords

An \* indicates a required field.

\*Login ID

\*Password

\*Re-enter Password

### Security Questions and Answers

Security Questions allow you to provide an Electronic Signature and reset your Password.

Select Security Questions and enter Answers.

An \* indicates a required field.

\*Security Question 1

\*Answer 1

\*Security Question 2

\*Answer 2

Click Continue to proceed with Registration. Click Cancel to return to the Actuary Information page.

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# Actuary Verification page



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YOU ARE HERE

1. Actuary Registration
2. Actuary Information
3. Actuary Login Information
4. **Actuary Verification**
5. Actuary Confirmation

## Actuary Verification

Review your Actuary Information and Actuary Login Information.

### Actuary Personal Information

**First Name:** Thomas

**Middle Initial:**

**Last Name:** Ruehle

**Social Security Number:** 123-59-9732

**Date of Birth:** 01/01/1901

**Company Name:** 1st Company of America

**Job Title:** Actuary

**Email Address:** Truehle@1stcoa.com

**Phone Number:** (546) 546-6546

**Fax Number:**

### Actuary Mailing Address

**Street Line 1:** 1 West P Ave

**Street Line 2:**

**City:** Cockeysville

**State:** ID

**Zip Code:** 21030

### Actuary Login Information

**Login ID:** AC07101

**Password:** \*\*\*\*\*

**Security Question 1:** What is your favorite movie?

**Answer 1:** Jumanji

**Security Question 2:** What elementary school did you attend?


**Answer 2:** Sunnyside Elementary

Click Confirm to register. Click Edit to make changes. Click Cancel to return to the Actuary Login Information page.

[Confirm](#) [Edit](#) [Cancel](#)

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# Actuary Confirmation page

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YOU ARE HERE

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## Actuary Confirmation

You have successfully completed the Actuary Information and Actuary Login Information. CMS' RDS Center will process and validate this information. When this process is successfully completed, you will receive an email notification confirming your Registration. You can then access the RDS Secure Website using the Login ID and Password created. If you do not receive an email within five business days, contact [CMS' RDS Center Help Line](#).

Print this page for your records.

### Actuary Information

**First Name:** Thomas

**Middle Initial:**

**Last Name:** Ruehle

**Social Security Number:** \*\*\*\*\*

**Date of Birth:** 01/01/1901

**Company Name:** 1st Company of America

**Job Title:** Actuary

**Email Address:** [Truehle@1stcoa.com](mailto:Truehle@1stcoa.com)

**Phone Number:** (546) 546-6546

**Fax Number:**

### Actuary Mailing Address

**Street Line 1:** 1 West P Ave

**Street Line 2:**

**City:** Cockeysville

**State:** ID

**Zip Code:** 21030

### Actuary Login Information

**Login ID:** lrhAC07101

**Password:** \*\*\*\*\*

**Security Question 1:** What is your favorite movie?

**Answer 1:** \*\*\*\*\*

**Security Question 2:** What elementary school did you attend?

**Answer 2:** \*\*\*\*\*

Click Exit to return to the RDS Program Website Home page.

[Exit](#)

# Plan Sponsor List page

- After re-registration is complete, all Plan Sponsors and Applications are reattached to the Actuary in the system
- After clicking on a link under Plan Sponsor ID, the same page details as the current screens will display

**Plan Sponsor List with Application Summary**

Click a Plan Sponsor ID to view a Plan Sponsor's Applications.

Click any of the links in the Account Settings box to perform actions related to your account.

Plan Sponsor ID	Organization Name	Applications Attested	Applications Awaiting Attestation
<a href="#">50717</a>	1st Company of America	1	-
<a href="#">50837</a>	Generic Staples, Inc.	6	1
<a href="#">50619</a>	Standard Chairs International	2	-
<a href="#">50620</a>	Interdepartment Delivery, Inc.	1	-
<a href="#">50621</a>	Application Logistics	4	-
<a href="#">50602</a>	Connectivity Partners	1	-
<a href="#">1059</a>	Saliburg Financial	5	-

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Print this page

**LOGIN INFORMATION**  
Thomas Ruehle  
Actuary  
July 10, 2009

**ACCOUNT SETTINGS**  
[Manage User Information](#)  
[Change Password](#)

# Re-registration Tips



- **Remember: One User, One Role, One User Account**
- Contact CMS' RDS Center Help Line if you have multiple roles in the RDS Secure Website
- Start early and maintain communication with the Plan Sponsor

# Actuary Assignment

# Current Actuary Assignment Process



- Actuaries are currently assigned to individual Benefit Options listed within an Application
- An email is sent each time the Actuary is assigned to a Benefit Option
- The Actuary accesses the RDS Secure Website and Attests each Benefit Option separately

# New Actuary Assignment Process



- Actuaries will now be assigned at the Application Level
- Plan Sponsors will still have the option to have multiple Actuaries per Application by assigning Actuaries to individual Benefit Options
- One email will be sent listing the Application to which the Actuary is assigned

# Actuary Attestation

# Current Attestation Process



- The Account Manager, Authorized Representative, or a Designee with the Assign Actuary privilege determines the Attestation Method
- The Actuary attests each Benefit Option in the Application individually

# New Attestation Process

- The Actuary will select the Attestation Method

# New Attestation Process

- Each Actuary will attest to all of the Benefit Options assigned to them within the Application

**Attestation**

Two or more **Benefit Options** have been combined to meet the **Net Value** test as set forth at 42 C.F.R. §423.884(d), and each option not so combined individually meets the **Net Value** test as set forth in 42 C.F.R. §423.884(d).

Benefit Option Name	Unique Benefit Option Identifier	Benefit Option Type
Mail Order	12	Fully Insured
Pharmacy	55	Fully Insured

I hereby attest to the following:

**LOGIN INFORMATION**  
Mary Roberts  
Actuary  
March 1, 2009

**APPLICATION INFORMATION**  
**Plan Sponsor ID:** 51781  
**Plan Sponsor Name:** 1st Company of America  
**Application ID:** 41737  
**Plan Name:** Gold Option Plan  
**Plan Start:** January 1, 2009  
**Plan End:**

# Attestation Responsibility

## Delete Benefit Option Verification

Print this page

**Warning**

- If you complete this process you will delete a Benefit Option on a previously attested Application and the Actuary must attest this Application again.

Review the Benefit Option information.

An \* indicates a required field.

**Benefit Option Name:** Mail Order

**Unique Benefit Option Identifier (UBOI):** 12

**Benefit Option Type:** Fully Insured

\*Click the checkbox to confirm that you understand that the Actuary must attest this Application again if this Benefit Option is deleted.

Click Confirm to delete this Benefit Option. Click Cancel to return to the Benefit Option page.

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**LOGIN INFORMATION**

Ellen R. Adams  
Authorized Representative  
March 1, 2009

**APPLICATION INFORMATION**

**Plan Sponsor ID:** 51781  
**Plan Sponsor Name:** 1st Company of America  
**Application ID:** 41737  
**Plan Name:** Gold Option Plan  
**Plan Start:** January 1, 2009  
**Plan End:** December 31, 2009  
**Application Status:** Incomplete  
**Reconciliation Deadline:** March 31, 2010

# Attestation Responsibility

Print this page

## Add A Benefit Option

### Warning

- The Actuary must attest this Application again because a Benefit Option is being added.

Enter the required information and select the Benefit Option Type to add a Benefit Option.

An \* indicates a required field.

### Benefit Option Information

\*Benefit Option Name

\*Unique Benefit Option Identifier (UBOI)

\*Benefit Option Type

\*Click the checkbox to confirm that you understand that the Actuary must attest this Application again because a Benefit Option is being added.

Click Continue to add the Benefit Option. Click Cancel to return to the Benefit Option Summary page.

SECURE AREA

### LOGIN INFORMATION

Ellen R. Adams  
Authorized Representative  
March 1, 2009

### APPLICATION INFORMATION

**Plan Sponsor ID:**  
51781  
**Plan Sponsor Name:**  
1st Company of America  
**Application ID:**  
41737  
**Plan Name:**  
Gold Option Plan  
**Plan Start:**  
January 1, 2009  
**Plan End:**  
December 31, 2009  
**Application Status:**  
Incomplete  
**Reconciliation Deadline:**  
March 31, 2010

# Attestation Responsibility

## Edit Benefit Option

Print this page

**Warning**

- If changing a Benefit Option Type involves any change to benefits, cost-sharing, or retiree premium contributions, your Actuary must re-evaluate whether the plan satisfies the Actuarial Equivalence Tests. Please contact your Actuary to determine whether the Benefit Option and plan satisfies the Actuarial Equivalence Tests for the applicable 12-month annualized period, taking into account any such changes.

Enter a name for the Benefit Option.

Select Benefit Option Type.

An \* indicates a required field.

### Benefit Option

\*Benefit Option Name

**Benefit Option**  
**Name:** Mail Order

**Unique Benefit** 12  
**Option Identifier**  
**(UBOI):**

\*Benefit Option Type

Click Continue to save your changes. Click Cancel to return to the Benefit Option page.

SECURE AREA

### LOGIN INFORMATION

Ellen R. Adams  
Authorized Representative  
March 1, 2009

### APPLICATION INFORMATION

**Plan Sponsor ID:**  
51781  
**Plan Sponsor Name:**  
1st Company of America  
**Application ID:**  
41737  
**Plan Name:**  
Gold Option Plan  
**Plan Start:**  
January 1, 2009  
**Plan End:**  
December 31, 2009  
**Application Status:**  
Incomplete  
**Reconciliation Deadline:**  
March 31, 2009

# Actuary Next Steps

# Re-register



- **In the beginning of August 2009**, an Actuary Invitation email will be sent to each RDS Secure Website Actuary containing a link for re-registration
- The link within the Actuary Invitation email is assigned to a specific Actuary
- Clicking on this link starts the re-registration process
- If the Actuary Invitation email is deleted, the Actuary will have to contact CMS' RDS Center Help Line for re-registration assistance

# Re-register



- Re-registering as soon as possible is important because processing may take several days to complete
- Re-registration will not affect previous Attestations completed by the Actuary
- Actuaries should be mindful of Plan Sponsor RDS Application Deadlines and complete re-registration prior to these deadlines

# Re-register



- If an Actuary attempts to log into the RDS Secure Website prior to re-registration, they will receive an error message

A screenshot of the RDS Secure Web Site showing a session expiration message. The header is blue with the CMS logo and the text "RDS Secure Web Site". The main content area is white and contains the following text:

**Session Expiration**

Your session has timed out due to inactivity.

Please [login](#) again if you wish to continue accessing the RDS Secure Web Site.

# Multiple Roles Prohibited



- An individual may only have **one** user account
- If an Actuary has multiple user accounts or multiple user roles, he/she must contact CMS' RDS Center Help Line

- When an Actuary has multiple user IDs or roles in the RDS Secure Website, communicating with the Plan Sponsor is very important
- An Actuary should complete re-registration early and inform the Plan Sponsor of their current status and role
- Actuaries must complete the re-registration process and allow time for validation and Attestation before the Application Deadline

# Important Dates



- *Early August 2009*
  - Announcement added to the Program Website informing Actuaries of re-registration
  - Actuary accounts become inactivated
  - Actuary Invitation email to be sent to Actuaries with link for re-registration
  - Email sent to Account Managers and Authorized Representatives that need to communicate with their Actuaries about the re-registration process

# Important Dates



- A Plan Sponsor must submit a Valid Initial Online Application **AND** a Valid Initial Retiree List **by no later than 90 days prior to the beginning of the plan year**
- *October 2, 2009*
  - Application Deadline for Plan Year start date of **January 1, 2010**
- *November 1, 2009*
  - Application Deadline for Plan Year start date of **January 1, 2010** when an extension has been approved by CMS' RDS Center

# In Conclusion



- In this session we have reviewed:
  - The upcoming additions to the Actuary Registration Process
  - The streamlined Actuary Assignment Process
  - The changes to the Attestation Process
  - Multiple Role Conflict and the steps to resolution