CDO Renewal Job Aid

Overview

The Centers for Medicare & Medicaid Services (CMS) certifies certified application counselor designated organizations (CDOs) on a specific timeframe, typically two (2)-years. To renew your CDO agreement, your leadership contacts (Organization Senior Official, CAC Project Director, or Secondary Contact, if applicable) should access the CDO Organizational Maintenance web form, referred to as the maintenance web form, to update your organization’s information and submit a new signed and dated CMS-CDO agreement when required.

This job aid will walk you through how to:

- **Review and Update your CDO Information**
- **Upload a New Signed and Dated CMS-CDO Agreement**
- **Confirm Your Submissions**

Important Notes:

**Note:** Your leadership contacts will be able to renew starting thirty (30) calendar days prior to your organization’s expiration date. If your organization does not renew your CDO agreement before your expiration date, your organization will become inactive. If you become inactive, your organization will need to re-apply to the CDO Program.

**Note:** If you do not know your expiration date, you can email us at CACQuestions@cms.hhs.gov. You can also view your expiration date in the Agreement PDF table on the CDO Summary page of the maintenance web form.

Additional Help, Resources, and Troubleshooting

For additional CDO renewal process resources please access:

- **CDO Renewal Process Overview Video** – provides a step-by-step demonstration of renewing an organization’s certified application counselor designated organization (CDO) status using the maintenance web form.
- **CDO Learning Series – CDO Renewal Video** – provides guidance for renewing your CDO status with the Centers for Medicare and Medicaid Services (CMS).
- **CDO Organizational Maintenance Web Form User Guide** – provides instructional guidance about how to use the web form.
- **CDO Organizational Maintenance Web Form Troubleshooting FAQs** – contains frequently asked questions about how and when to use the web form.

**Review and Update your CDO Information**

To update your organization’s information during your agreement period, your leadership contacts should access the **CDO Organizational Maintenance web form**.

**Note:** Your leadership contacts must use the email address entered on the CDO application when creating an access code or logging in to the maintenance web form.

From the CDO Summary page, you can access several resources for the various tasks done using the maintenance web form. The User Guide provides detailed instructions on each of the maintenance web form tables and the job aids specifically focus on tasks associated with CDO Renewal, the CAC Roster and Contact Changes.

![Figure 1: CDO Summary Page Resources](image)

From the CDO Summary page, you can review and/or edit your organization's information. Each table on the CDO Summary page represents a section of the CDO application web form.

**Note:** You are required to submit a new, signed CMS-CDO agreement if you change any of the following: Organization Name, Operating State, and/or Organization Senior Official’s name.

You are **not** required to submit a new, signed CMS-CDO agreement if you make any other change. If you change any of the following: any part of the Organization Headquarters Address or Service Location counties, the system creates an amendment to your current, signed, and approved CMS-CDO agreement upon submission of these changes.
CDO Summary

**Instructions**
Select the action links in any section to update your organization’s information.

*Note:* The web form will prompt you for a new signed CMS-CDO agreement if you change the following: Organization name, Operating State, Organization Senior Official’s name.

*Note:* The web form will create an amendment to your signed CMS-CDO agreement if you change the following: Headquarters’ address, Operating counties.

Figure 2: CDO Summary Instructions

**Organization Headquarters Information**

The Organization Headquarters Information table allows your leadership contacts to review and/or edit your organization’s headquarters information.

To edit any of your organization’s headquarters information:

1. Select *Edit* at the bottom of the *Organization Headquarters Information* table.

Figure 3: Organization Headquarters Information Table and Edit Button

2. On the *Organization Headquarters Information* page, update your *information* as needed.

3. When edits are complete, select *Save & Return*. The web form returns you to the *CDO Summary* page.
4. When finished with your changes, select **Submit** on the **CDO Summary** page at the top or the bottom of the page.

**Service Locations**

The Service Locations table allows your leadership contacts to review and/or edit the states and counties in which your organization provides enrollment assistance.

To edit your organization’s service location states and/or counties:

1. Select **Edit** at the bottom of the **Service Locations** table. The web form navigates to the **Edit Service Locations** page.

![Figure 4: Service Locations Edit Button](image.png)

2. On the **Edit Service Locations** page, select the **state** in which your organization will provide enrollment assistance services from the drop-down menu. The **Available Counties** list will populate with the counties for the state chosen.

3. Select the **county** or **counties** in which your organization will provide enrollment assistance services.

4. Move the applicable **counties** to the **Selected Counties** list by using the arrows above the **Available Counties** table. You may filter the list of counties by entering the county name in the **Filter** field.

5. To remove a county or state, select the **state** and move the list of **counties** from the **Selected Counties** table to the **Available Counties** table.

6. Select **Update Table**. The **Service Locations** table will include all service locations for the organization that you selected.

7. Repeat steps 2 to 6 for each state in which your organization will provide enrollment assistance services.

8. When edits are complete select **Save & Return**. The web form returns you to the **CDO Summary** page.
9. When finished with your changes, select **Submit** on the **CDO Summary** page either at the top or the bottom of the page.

**Additional Organization Information**

The Additional Organization Information table allows your leadership contacts to review and/or edit information about the type of work your organization performs.

To edit any of your organization’s additional information:

1. Select **Edit** at the bottom of the **Additional Organization Information** table. The web form navigates to the **Edit Additional Organization Details** page.

   ![Figure 5: Additional Organization Information Edit Button](image)

2. On the **Edit Additional Organization Details** page, update your organization’s information as needed.

3. When edits are complete, select **Save & Return**. The web form returns you to the **CDO Summary** page.

4. When finished with your changes, select **Submit** on the **CDO Summary** page either at the top or the bottom of the page.
Contact Information

The Contact Information table allows your leadership contacts to review and/or edit information for your organization’s contacts. Each organization is required to have an Organization Senior Official and a CAC Project Director. You may designate a third contact, referred to as the secondary contact, but it is not a CMS requirement.

![Contact Information Table]

To edit or replace an existing contact’s information:

1. Select Manage Contacts at the bottom of the Contact Information table.
2. On the Edit Contact Information page, make the necessary edits to any of the contact’s information.
3. When edits are complete, select Save & Return either at the top or the bottom of the page.
4. When finished with your changes, select Submit on the CDO Summary page either at the top or the bottom of the page.

Upload a New Signed and Dated CMS-CDO Agreement

Once you have finished making your updates, you can upload a new signed and dated CMS-CDO agreement. To do this, your leadership contacts should access the CDO Organizational Maintenance web form.
Note: Your leadership contacts must use the email address entered on the CDO application when creating an access code or logging in to the maintenance web form.

From the CDO Summary page, your leadership contacts can replace your existing CMS-CDO agreement with a new signed and dated version.

Thirty (30) calendar days prior to your expiration date, your leadership contacts will have access to the Replace link in the Agreement PDF table on the CDO Summary page.

Note: Your leadership contacts will not be able to access the Replace link if the date is more than thirty (30) calendar days prior to your organization’s expiration date unless the contact updates your Organization Name, Operating State, and/or Organization Senior Official’s name.

To generate your up-to-date signed CMS-CDO agreement:

1. Log in to the CDO Organizational Maintenance Web Form.
2. In the Agreement PDF table on the CDO Summary page, select Replace.

![Agreement PDF Table Replace Link]

3. In the pop-up select OK after updating any of your organization’s information as needed.
4. On the Attestation and Agreement Upload page, select Print PDF Agreement.
5. Review pages 1 and 12 of the agreement and confirm your organization’s information. If any information is incorrect, return to the Attestation and Agreement Upload page and select Cancel. Repeat steps 2 through 5 to generate another agreement.
6. Obtain your Organization Senior Official’s signature and date the signature page of the agreement.

To upload your agreement:

2. In the pop-up window, navigate to the place you saved a PDF version of your updated, signed agreement on your computer and select the file to upload.
3. Select Save & Return. If you did not successfully upload your agreement, you will receive a warning message.
4. On the **CDO Summary** page, select **Submit** either at the top or the bottom of the page.

5. On the **CDO Summary** page, if you have not done so already, add your **CAC roster** (refer to the **CDO Roster Job Aid** for instructions).

6. On the **CDO Summary** page, select **Submit** to submit your changes.

**Confirm Your Submissions**

The Confirmation page provides a summary of the session and allows your leadership contacts to print and save a PDF confirmation containing the information submitted.

**Note:** CMS recommends that the contact completing the renewal submission prints and saves this confirmation for your records since the confirmation page will not display again once the contact exits the web form. Your leadership contacts cannot return to save and print it later.
Figure 9: Confirmation Page and Print PDF Button

1. Select **Print PDF** to generate a PDF confirmation.
2. Select **Exit** to exit the web form.

Email any questions to **CACQuestions@cms.hhs.gov**. Be sure to include your organization’s name and CDO ID in the body of your email.